

LOYALTY AND THE ARMY: A STUDY OF WHY THE CIVIL WAR GENERALS  
ROBERT LEE, JOHN PEMBERTON, THOMAS JACKSON, AND  
EDWIN ALEXANDER JOINED THE CONFEDERACY

A thesis presented to the Faculty of the U.S. Army  
Command and General Staff College in partial  
fulfillment of the requirements for the  
degree

MASTER OF MILITARY ART AND SCIENCE

by

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B.S., U.S. Air Force Academy, Colorado, 1979

Fort Leavenworth, Kansas

1995

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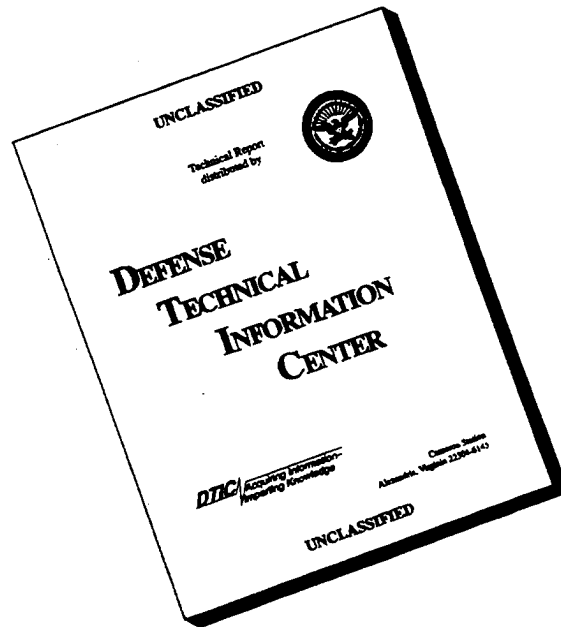
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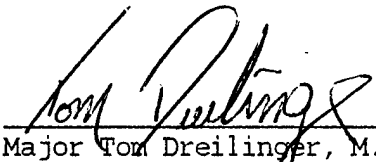
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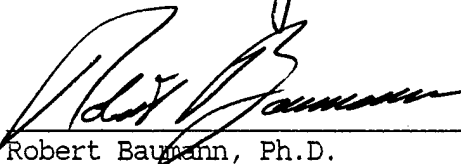
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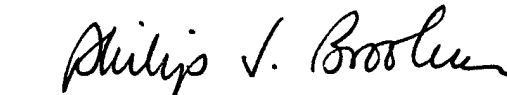
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## ABSTRACT

LOYALTY AND THE ARMY: A STUDY OF WHY THE CIVIL WAR GENERALS ROBERT LEE, JOHN PEMBERTON, THOMAS JACKSON, AND EDWIN ALEXANDER JOINED THE CONFEDERACY by Major Gary A. Skubal, USAR, 105 pages.

This study investigates the concept of loyalty as applied in the U. S. Army. In light of the fact that the term has been dropped from the official definition of the Army ethos in the 1994 version of FM 100-1, the study investigates the implications from a historical perspective. The American Civil War is used as the only appropriate conflict where issues of loyalty were widespread in the existing U.S. Army. The choices made by the individuals involved had severe consequences and were not merely academic in nature.

The study defines loyalty and applies the definition to the analysis of why the subject officers chose to fight for the Confederacy against the object of their former allegiance--the U.S. Constitution. Each officer is summarized and subjective rationale is offered for the specific reasons underlying each of their decisions.

The study concludes that an Army Ethos may be useful for providing a framework of discussion for matters of professional conduct. However, due to the numerous and diverse objects competing for one's loyalty, the Army ethos has only marginal effect in influencing decisions of great importance.



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## CHAPTER 1

### INTRODUCTION

Since mankind first took up arms to settle their disputes, the loyalty of the warriors involved has been a matter of great concern. Often throughout recorded history, fates of entire nations have changed dramatically due to disloyalty of their soldiers. Absalom rebelled against King David and led an entire army of Israel against the crown. He died hanging in an oak tree while twenty thousand of his soldiers perished by the sword.<sup>1</sup> To prevent such situations, sovereigns try resorting to solemn oaths of allegiance--with our own earliest version being most thorough:

I . . . do acknowledge the United States of America to be Free, Independent and Sovereign States, and declare that the people thereof owe no allegiance or obedience to George the Third, King of Great Britain; and I renounce, refuse and abjure any allegiance or obedience to him; and I do swear that I will to the utmost of my power, support, maintain and defend the said United States against the said King George the Third, his heirs and successors, and his or their abettors, assistants and adherents, and will serve the said United States in the office of . . . which I now hold, with fidelity, according to the best of my skill and understanding.<sup>2</sup>

Unfortunately, the blank spaces of one such oath were filled in with the words, "Benedict Arnold, Major General." Even in the face of tyrants, with an army of men committed to a common cause, a traitor can arise with shocking boldness and do untold harm.

The U.S. Army recently released its newest version of the manual which, in the words of the Chief of Staff General Gordon R. Sullivan,

"is the foundation for all Army doctrine. From our doctrine flows how we think about the world and how we train, equip, and organize our forces to serve the Nation." <sup>3</sup> This manual, FM 100-1, entitled *The Army*, "expresses the Army's fundamental purpose, roles, responsibilities, and functions, as established by the Constitution, Congress, and the Department of Defense."<sup>4</sup> It is the "cornerstone" document, and defines "the qualities, values, and traditions that guide the Army in protecting and serving the Nation."<sup>5</sup> Therefore, any omissions or errors in this manual would logically have serious cascading effects throughout the Army. What then is the relationship between loyalty and FM 100-1, *The Army*?

#### The Problem

In an increasingly complex world, nationalistic lines are becoming harder to define. One has only to consider the situations in Bosnia or Moldova to see the emerging desire for self-determination and the threat to existing governments. The loyalty issue is further complicated as it becomes more difficult to identify what particular attributes a sovereign must have to be worthy of an individual's allegiance. Although it may seem that this problem would be confined to third-world nations, world powers and superpowers are not immune. Most recently, officers in the former Soviet Union have been forced to deal with this issue in unforeseen ways as the following 1993 press release illustrates:

Officers in the Black Sea Fleet Said Persecuted: The press center of the Ukrainian Navy has reported that in subunits deployed in Kacha officers who have taken an oath of allegiance to Ukraine and received Ukrainian citizenship are routinely persecuted. They

were told to either look for employment in the Ukrainian Navy or to resign.<sup>6</sup>

As officers of the former Soviet Union, they had undoubtedly taken the oath common to that regime. When the economy collapsed and politics began to change the structure of the superpower, individual officers were faced with the dilemma of determining just where and to what their allegiance lay. As one might imagine, this was not simply an academic exercise. Drastic consequences could and did result from these decisions.

Officers in the American Army have not been faced with these types of decisions in over a century. However, as the world continues to destabilize, the future is certainly open to radical speculation. To a helicopter pilot patrolling the East-West German border in the late 1980s, the Soviet regime appeared to be as stable as anytime in its history. Yet in less than five years the entire system had collapsed. In such times it would make sense that military officers should have a fairly clear idea of the meaning of loyalty.

Yet the trend in FM 100-1 is otherwise. A cursory reading of this manual gives one the feeling that all is well in our Army doctrinal foundations. But when the chapter, "The Profession of Arms," is compared to the same chapter in the previous edition of FM 100-1, a significant change in value is evident.

This chapter in the latest version is divided into four parts: The Army Ethos, Professional Qualities, The American Soldier, and Esprit de Corps and Pride. The first part is the foundation for the following three and is described as follows:

The Army ethos, the guiding beliefs, standards and ideals that characterize and motivate the Army is succinctly described in one word--DUTY. Duty is behavior required by moral obligation, demanded by custom, or enjoined by feelings of rightness. Contained within the concept of duty are the values of integrity and selfless service, which give moral foundation to the qualities the ethos demands of all soldiers from private to general officer.<sup>7</sup>

This sounds noble enough for a professional military, but the change over time of this ethos shows a trend away from a broader perspective and towards a very narrow definition. This change is evident in the previous edition's definition of the Army Ethos:

The Army ethic consists of four professional values: Duty, Integrity, Loyalty and Selfless Service. Duty and Integrity are great moral imperatives which are also governed by the Uniform Code of Military Justice. The values of Selfless Service and Loyalty are governed by convention, tradition, and the character of the profession. When internalized and adhered to, these values promote mutual confidence and understanding among all soldiers and inspire the special trust and confidence of the nation.<sup>8</sup>

Apparently, the authors of the newest version no longer consider loyalty to be a part of the Army Ethos as it is the only value of the previous four not mentioned. This becomes more obvious in the subsequent descriptions of integrity and selfless service in the latest version.

As implied by the descriptive values of Integrity and Selfless Service, a soldier's performance of duty is the central measure of his or her character. While many aspects of these values are governed by the Uniform Code of Military Justice, other elements are governed by convention, tradition, and the very nature of the profession. When internalized to the point of habit, these values promote mutual confidence and understanding among all soldiers and merit the special trust and confidence of the Nation.<sup>9</sup>

In the place of loyalty, the authors now list only "other elements." Obviously they do not intend for loyalty to be included. The issue is further in question when one considers the definition of loyalty in the older edition.

Loyalty to the nation, to the Army, to the unit and its individual soldiers is essential. The oath we take requires loyalty

to the nation and an obligation to support and defend the Constitution of the United States.<sup>10</sup>

Surely no professional American soldier could argue with this value, yet it has been deleted in the current Army Ethos. Perhaps the authors wished to leave less to interpretation in the new version. Indeed, the taking of the oath is described in the third section--The American Soldier. However, the meaning given to the purpose of the oath is rather alarming when viewed in the context of loyalty. "The swearing-in ceremony is a formal, public commitment to the Army Ethos."<sup>11</sup> The oath, however, is very clearly to the Constitution of the United States, not the Army Ethos. Again, the authors apparently wish to focus only on duty. In the case of the oath, only the phrase "that I will well and faithfully discharge the duties of the office upon which I am about to enter" mentions anything resembling the current Army Ethos.<sup>12</sup> Perhaps the actual intent of the authors is contained in their own description of duty:

A sense of Duty compels us to do what needs to be done at the right time despite difficulty or danger. It leads to obedient and disciplined performance. Duty is a personal act of responsibility manifested by accomplishing all assigned tasks to the fullest of one's ability, meeting all commitments, and exploiting opportunities for the good of the group.<sup>13</sup>

For whatever reasons, our Army Ethos focuses on one word--Duty. This is a change from previous ideas which included the concept of loyalty; specifically and perhaps most important--loyalty to our nation. This may in fact be expedient to the national command authority in ways not before considered. For example, NATO existed for over 45 years to contain aggressive acts of the Soviet Union. Even though the Soviet Union no longer exists, the member nations of NATO have found apparent

usefulness in the continuance of the organization. Regional conflicts continue to destabilize areas close to NATO countries, and it would presumably be to the advantage of those countries to have American military forces (under NATO command) available should the need arise. Air power has already been used in a very limited fashion. However, American military personnel are sworn to "support and defend the Constitution of the United States" and not the edicts of NATO or even the United Nations. It was fairly easy during the Cold War to feel the threat to our security from the Soviet Union. Bosnia, however, is rather more vague. Perhaps the assumption is that the member nations of NATO share common values and that American soldiers will have no difficulty serving under French, German, or Italian commanders. But as international situations become increasingly more clouded, will American military personnel question the legal authority of their non-American commanders? Probably not if DUTY is the only byword of the Army ethos. But if these soldiers are loyal to the Constitution of the United States and its defense, problems could arise.

#### The Research Question

The question itself is simple and straightforward. Considering American historical tradition and experience, should loyalty be a part of the Army Ethos?

#### The Scope

The answer to the research question will not be readily provable by deductive style reasoning nor necessarily limited in scope. This

thesis will not address all the inherent problems and issues evoked by the subject of loyalty, but, since this is an exercise in investigating the need (or lack thereof) of loyalty as part of the Army Ethos, will be confined to the investigation of examples in the history of the American Army. To find subjects appropriate to this investigation, only situations which required actual tests of loyalty and not merely academic rhetoric can be used. The individuals chosen needed to have been faced with a decision to place their allegiance with one of at least two diametrically opposed forces. The subject should have been aware that loss of life could result from this decision and especially, the decision had to have been made without coercion.

In the military history of the United States, conditions conducive to these requirements occurred twice: the Revolutionary War and the Civil War. Since, generally speaking, many of those who took part in the Revolutionary War were not born in America nor had they previously sworn an oath of allegiance to either side, this discussion will be limited to the American Civil War. This war gave rise to many loyalty issues which are not generally well known. Although public education may seem to have given the impression that a soldier fought for whichever side his home state was on, this was not necessarily the case. At least one account puts the figure of white citizens from slave-holding states fighting for the Union at 296,579 men. This is out of a total of 1,490,000 Federal troops, or about 20 percent.<sup>14</sup> Over twenty generals born in slave holding states commanded at the corps level or higher in the Union Army.<sup>15</sup> Each of these individuals must have gone through a personal soul-searching debate as to where his



loyalty should lay. Although a statistical study might yield relevant facts and figures associated with the topic, the historical data is not sufficient to support such an effort. For this reason this thesis will concentrate on a field narrow in quantity and increase the quality of the study by a deeper look at the lives of selected individuals.

The investigation will cover four Confederate Generals who had been in the Federal (Union) Army before the war. The results will then be applied to the research question in the form of inductive reasoning. Each of these persons had sworn an oath of allegiance (see appendix) to the Constitution of the United States that is very similar to that required for service today. However, each chose to disregard their oath and subsequently caused considerable harm to the United States. These officers were Generals John C. Pemberton, E. P. Alexander, Thomas J. Jackson, and Robert E. Lee. Each had a common background in military ethics as they all attended West Point, an institution known for its dedication to the motto: Duty, Honor, Country. Other than this, however, their personal backgrounds were markedly dissimilar. These officers could only draw upon their accumulated knowledge and experiences, so the research will pertain to their histories up to the point when they actually decided to fight for the Confederacy. Somehow these men decided that their loyalty was not in accordance with the oath they had once taken.

A study of this nature has certain imposing limitations. The historical figures and anyone who knew them prior to 1861 are all deceased thereby leaving only written historical accounts in finite numbers available for research. Biographers and others who have since

published written accounts all have particular biases of some sort.

Some attempt to convey these personal feelings, such as this excerpt from a preface by Michael B. Ballard, author of *Pemberton: A Biography*:

most of the battle sites we walked over were scenes of major battles during the Vicksburg campaign. Our reading of the available books on that pivotal event convinced us that the Confederacy might have saved Vicksburg and won the war if only a competent commander had been on hand to lead Rebel defenders. We had a very low opinion of John C. Pemberton, that despicable Pennsylvania-born Confederate general whose incompetence lost Vicksburg. I am sure no one would be more surprised . . . to see my name as author on the cover of a Pemberton biography, . . . an in-depth study of history, complemented by excellent graduate training, gave me the maturity to look beyond personal prejudices.<sup>16</sup>

Although most authors probably believe that they are unbiased, a reader can really only rely on critical evaluations by others competent in the field. This means that a wider variety of authors will increase the probability that an overall accurate picture of the topic is presented. Unfortunately, materials tend to be produced in direct relationship to the interests showed by the readers. Not surprisingly, materials on Robert E. Lee are numerous whereas those on John C. Pemberton are considerably more scarce. For example, Ballard states:

I decided to do a biography of Pemberton. After all, the only book ever written about him was published in 1942 and had been written by his namesake and grandson.<sup>17</sup>

Lack of complete materials has a tendency to cloud the exact picture but then this is the case with virtually any historical study.

### Assumptions

The first assumption is that the extant historical material available allows for a fairly accurate rendition of the subject until the spring of 1861. Second, the relative ability to see through biases

of the authors along with limiting those of the writer is assumed. Third, the nature of this paper presupposes that there is indeed a relationship between the personal ethics and ideas on loyalty of the subjects to the particular choices they made. This includes the experiences of their upbringing, formal and informal schooling, and other character developing situations (such as participation in the Seminole and/or Mexican wars) before the secession of the southern states. The validity of these assumptions is necessary for the credibility of the answer to the research question.

#### The Extant Literature

The most preferable type of evidence would be statements by the individual officers directly concerning the topic. Naturally these are quite rare. Autobiographies should be the most informative since they are written in the hand of the subject. Unfortunately (for the historian) no one wants to be remembered in a negative light so an autobiography is always suspect on the account of presenting a picture of the person only as they wish to be remembered. Of the four subjects, only General Alexander had written a true autobiography, but his memoirs begin with duty in Utah in the late 1850s.<sup>18</sup> This tentatively addresses only a very short period of which this study is concerned, although insight may be gained from Alexander's occasional comments referencing his younger days.

Biographies are the most comprehensive sources available on the four generals but still contain obvious prejudices. Some can provide evidence of a more objective view by the nature of their disassociation

with the war itself. Concerning the British author G. F. R. Henderson writing of General Jackson, "there was the advantage of his own attitude--that of a foreign observer not personally, emotionally or politically involved in the issues of the conflict."<sup>19</sup> Each of the four officers has at least one biography currently available with those of Lee and Jackson being more numerous.

Perhaps the most revealing resources available are personal letters written by the subjects, their families, and their acquaintances. These offer undistorted word pictures (contextual, at least) of the feelings and thoughts of the writers through their own eyes. However, the use of letters involves inherent problems. They seldom contain negative information concerning the writer and the historian is often unable to decipher the writer's motives. Some appear to be obvious when the facts of the time are known as in this excerpt of a letter from General Lee to his daughter-in-law:

I received, last night, my darling daughter, your letter of the 18th from "Hickory Hill." . . . You must not be sick while Fitzhugh is away, or he will be more restless under his separation. Get strong and hearty by his return, that he may the more rejoice at the sight of you. . . . Nothing would do him more harm than for him to learn that you were sick and sad. How could he get well? So cheer up and prove your fortitude and patriotism.<sup>20</sup>

These lines were written shortly after his son had been wounded and captured by Union troops and with little doubt were intended to provide courage and hope to his son's wife. Another possible problem can be illustrated by a letter written by an earlier soldier, General Charles Lee of the American Revolution. General Lee had been a prisoner of the British and provided them a written plan by which he felt they could defeat the Americans. Later he claimed:

that he had not committed an act of treachery, indeed, that he had saved America when he was a prisoner, that is, he had deliberately persuaded Howe to waste much time by taking a southern sea route to Philadelphia while Burgoyne marched to his doom at Saratoga.<sup>21</sup>

If one only had the first document without Lee's later explanation, his treason would seem absolute. The explanation casts doubt upon the matter and renders it inconclusive. This sort of situation is possible in a wide variety of historic anecdotes. Again, the quantity and quality of evidence available to the researcher is the best insurance against such problems.

In general, the topic of loyalty has been addressed for quite some time but rarely in a manner fitting to the needs of the military. Loyalty is frequently referred to yet seldom described. This requires almost a study of its own and for this reason the general area of military ethics must be researched. Much of what could be considered American military ethics is based in the Judeo-Christian Bible. It is one of the oldest manuscripts available and figured prominently in the lives of at least two of the four subject officers.<sup>22</sup> Other books are compilations of short essays dealing with various military ethical issues and many have items relating to loyalty. The Air Force Academy seems to be in the forefront in this area with a forum entitled the Alice McDermott Memorial Lecture in Applied Ethics<sup>23</sup> and the well-published Colonel Malham M. Wakin, Professor and Head of the Department of Philosophy and Fine Arts. Many treatises appear to have been written during the Vietnam War era and contain material centered around civil obedience as related to military service. One essay deals with problems of German officers in the Wehrmacht during Hitler's rise to power and

the inherent loyalty problems of this regime. Much has been written and this issue will be more thoroughly analyzed and discussed in chapter 2.

### The Significance

This work has the potential of identifying serious problems with the concept of loyalty in the United States Army. A nation has the right to expect loyalty from those entrusted with its defense. American military members are sworn to uphold the Constitution of the United States. Allegiance to any other entity, whether to a person in the form of a commander or to a conglomeration of nation-states, such as NATO, could ultimately prove disastrous to the continuance of the United States. This issue is simply too important to be left in obscurity.

## Endnotes

- <sup>1</sup>2 Sam. 15-18 RSV (Revised Standard Version).
- <sup>2</sup>J. E. Morpurgo, *Treason at West Point: The Arnold-Andre' Conspiracy* (New York: Mason / Charter, 1975) 80-81.
- <sup>3</sup>FM 100-1: *The Army* 1994 (Washington, D.C.: Department of the Army, 1994), i.
- <sup>4</sup>Ibid., v.
- <sup>5</sup>Ibid., v.
- <sup>6</sup>Foreign Bureau Information Service-Soviet Region, 7 Oct 93, 59.
- <sup>7</sup>FM 100-1: *The Army* 1994, 6.
- <sup>8</sup>FM 100-1: *The Army* 1991, 15.
- <sup>9</sup>FM 100-1: *The Army* 1994, 6.
- <sup>10</sup>FM 100-1: *The Army* 1991, 16.
- <sup>11</sup>FM 100-1: *The Army* 1994, 10.
- <sup>12</sup>Ibid., 11.
- <sup>13</sup>Ibid., 6.
- <sup>14</sup>Charles C. Anderson, *Fighting by Southern Federals* (New York: The Neal Publishing Co., 1912) 10.
- <sup>15</sup>Ibid., 12.
- <sup>16</sup>Michael B. Ballard, *Pemberton: A Biography* (Jackson, MS: University Press of Mississippi, 1991), ix.
- <sup>17</sup>Ibid., ix.
- <sup>18</sup>E. P. Alexander, *Military Memoirs of a Confederate* (Charles Scribner's Sons, 1907) 1.
- <sup>19</sup>George F. R. Henderson, *Stonewall Jackson and the American Civil War* (Abridged) (Gloucester, MA: Peter Smith, 1968) x-xi.
- <sup>20</sup>Captain Robert E. Lee, *Recollections and Letters of General Robert E. Lee* (Garden City, NY: Garden City Publishing Co., 1924) 100-101.

<sup>21</sup>John Richard Alden, *General Charles Lee: Traitor or Patriot?* (Baton Rouge, LA: Louisiana State University Press, 1951) 174-175.

<sup>22</sup>Rev. J. William Jones, D.D., *Christ in the Camp or Religion in the Confederate Army* (B. F. Johnson & Co., 1887) 9.

<sup>23</sup>General George Lee Butler, *Personal Reflections on Integrity from an Old Grad* (CO: US Air Force Academy, 1993) ii.



## CHAPTER 2

### LOYALTY: THE CONCEPT

The first step in answering the thesis question is to ensure that the same standards are being applied to each case. Different people will attach different meanings to a word or phrase. Therefore, a working or "operational" definition of loyalty must be constructed. This operational definition should make sense both in present usage and in a historical context. It would be irrelevant to judge a historical figure against a standard known only to modern-day readers. Once an operational definition is constructed, the implications of the decisions of the four subjects should become obvious. This will provide the standard needed to compare their individual actions and relate those actions to the current Army Ethic.

Word definitions may combine to give a good generalization of the concept of loyalty from a modern viewpoint, but they are useless unless the idea can be conveyed in real terms. For instance, it is one thing to talk about marriage; but quite another to marry. In like manner, simply providing word definitions of loyalty fall far short of what the concept must mean for someone faced with choosing sides in a war. Just as a person is the sum of his experiences, so a concept (such as loyalty) is the summation of the historical ideas on which it is based. For this reason, the word will be defined first, followed by some older thoughts on the concept.

### Loyalty: A Modern Definition of the Word

Loyalty is synonymous with such words as allegiance, faithfulness, fidelity, and fealty. One dictionary defines the word loyalty and loyal as follows:

**Loyalty** 1. the quality or state of being loyal 2. that binding a person to something to which he is loyal

**Loyal** 1. unswerving in allegiance: as a. faithful in allegiance to one's lawful sovereign or government b. faithful to a private person to whom fidelity is due c. faithful to a cause, ideal, or custom 2. showing loyalty<sup>1</sup>

The editors further clarify the concept as follows:

syn FIDELITY, ALLEGIANCE, FEALTY, LOYALTY,...mean faithfulness to something to which one is bound by pledge or duty. FIDELITY implies strict and continuing faithfulness to an obligation, trust, or duty; ALLEGIANCE suggests an adherence like that of a citizen to his country; FEALTY implies a fidelity acknowledged by the individual and as compelling as a sworn vow; LOYALTY implies a faithfulness that is steadfast in the face of any temptation to renounce, desert, or betray<sup>2</sup>

To complete the concept, the idea of faithfulness must also be defined;

syn FAITHFUL, LOYAL, CONSTANT, STAUNCH, STEADFAST, RESOLUTE mean firm in adherence to whatever one owes allegiance. FAITHFUL implies unswerving adherence to a person or thing or to the oath or promise by which a tie was contracted<sup>3</sup>

The foregoing provides a framework for the modern idea of loyalty.

Historical thought and examples provide a better understanding of the term.

### Loyalty: The Judeo-Christian Perspective

One of the earliest incidents in the Bible leading to a cause for loyalty was the covenant between God and Noah. The idea of a covenant was a type of unilateral agreement instigated by God. After destroying all life on earth except for Noah, his family, and the ark full of animals, God said,

I now establish my covenant with you and with your descendants after you and with every living creature that was with you. . . . Never again will the waters become a flood to destroy the earth<sup>4</sup>

This first covenant required no action by Noah or anyone else. The next covenant was not nearly so simple nor lenient. God said to Abram (soon to become Abraham),

As for me, this is my covenant with you: You will be the father of many nations. . . . I will establish my covenant as an everlasting covenant between me and you and your descendants after you for the generations to come, to be your God and the God of your descendants after you . . . you must keep my covenant, you and your descendants . . . the covenant you are to keep: Every male among you shall be circumcised . . . it will be the sign of the covenant between me and you. . . . Any uncircumcised male, who has not been circumcised in the flesh, will be cut off from his people; he has broken my covenant.<sup>5</sup>

This covenant established a formal relationship between God and the people of Abraham. Obedience was the byword of this association.

Initially the main impact this had on Abraham's clan was the painful process of circumcision (Abraham was 99 years old at the time).

However, he was soon to learn exactly what was required to complete his part of the covenant. God said to Abraham,

Take your son, your only son, Isaac, whom you love and go to the region of Moriah. Sacrifice him there as a burnt offering on one of the mountains I will tell you about . . . Abraham built an altar there and arranged the wood on it. He bound his son Isaac and laid him on the altar, on top of the wood. Then he reached out his hand and took the knife to slay his son. But the angel of the Lord called out to him from heaven. . . . Do not lay a hand on the boy. . . . Now I know that you fear God, because you have not withheld from me your son, your only son . . . I swear by myself, declares the Lord, that because you have done this and not withheld your son, your only son, I will surely bless you and make your descendants as numerous as the stars in the sky . . . all nations on earth will be blessed, because you have obeyed me.<sup>6</sup>

So far, only obedience (admittedly rather extreme obedience) is required in this budding nation-state with a divine ruler. In the modern definition, "loyalty implies a faithfulness that is steadfast in the

face of any temptation to renounce, desert or betray." Abraham could renounce or desert God rather than kill his only son. In Abraham's mind, he had to choose between two conflicting loyalties; obey God and kill his son or, save his son and disobey God. His actions with Isaac formed a very early idea of loyalty to a sovereign (in this case devine) and the rudimentary elements of a hierarchy of loyalty.

As the descendants of Abraham multiply in number, their relationship with God continues to develop to include the beginnings of non-devine government. The covenant process continues when Moses is chosen by God to lead the Israelites out of Egypt. God says to Moses,

Now if you obey me fully and keep my covenant, then out of all nations you will be my treasured possession . . . you will be for me a kingdom of priests and a holy nation.<sup>7</sup>

Shortly afterward God gives Moses the Ten Commandments. Three of these commandments deal with loyalty:

You shall have no other gods before me. . . . You shall not make for yourself an idol in the form of anything in heaven above or on the earth beneath or in the waters below. You shall not bow down to them or worship them; for I, the Lord your God, am a jealous God. . . Honor your father and your mother<sup>8</sup>

Interestingly, God refers to the subsequent breaking of the first two of these commandments in the context of sexual faithlessness. God speaks to Moses, "these people will soon prostitute themselves to the foreign gods of the land they are entering. They will forsake me and break the covenant I made with them."<sup>9</sup> During the reign of King Josiah, God exclaims to the prophet Jeremiah,

Have you seen what faithless Israel has done? She . . . has committed adultery. . . . I thought . . . she would return to me but she did not . . . she defiled the land and committed adultery with stone and wood.<sup>10</sup>

Adultery and abandonment are significant events to the aggrieved human. God apparently uses these metaphors to emphasize the seriousness of lack of faithfulness or loyalty (of mortals to their deity) in familiar terms.

In the New Testament, the object of faithfulness and loyalty expands to include more than deities or people. Jesus responds to a questioning disciple, "If anyone loves me, he will obey my teaching."<sup>11</sup> The disciples were already in a superior/subordinate relationship with Jesus. This statement says that if they actually love Him then they must also obey his teachings. Since the teachings of Jesus can easily be considered an entire philosophy, He is saying that they must be true (loyal) to a doctrine which will become known as Christianity. Instead of simple loyalty to a deity or person, the concept now includes loyalty to an ideal.

#### English Ideas: Locke and Hobbes

Modern western democracies can trace political theory through two Englishmen--John Locke and Thomas Hobbes. Both of these men formulated political theory based upon the nature of man (competitive and self-centered) and how the idea of a "social contract" is the basis for government. They differed slightly in detail, but the ideas were largely the same. Locke felt strongly that one of the purposes of government should be the protection of personal property. In his *Treatise II* he states,

Political power, then, I take to be a right of making laws with penalties of death and, consequently, all less penalties for the regulating and preserving of property, and of employing the force of the community in the execution of such laws, and in the defense of

the commonwealth from foreign injury, and all this only for the public good.<sup>12</sup>

Thomas Hobbes approaches the subject from a more basic point of view.

Malham Wakin succinctly describes the contract as follows:

His [Hobbes] view of man in the Leviathan begins with the assumption that all men are equal in the state of nature; that is, as they appear in the world considered apart from any formal social or political structure. In the primal condition, every man has an equal right to everything and moral terms have no meaning. . . . This natural condition of man is chaotic, savage, and marked by violence. . . . Life for man in such conditions is "solitary, poor, nasty, brutish, and short." But man is also endowed with reason which ultimately leads him to conclude that if he is to survive, he must seek peace with other men. He must give up his right to harm other if he can persuade them to do likewise and enter into an agreement, a social contract with them. However, the mere fact of the existence of an agreement does not change human nature. It is still the case that "of the voluntary acts of every man, the object is some good to himself." So to guarantee that men will abide by their agreements, tremendous powers must be granted to government (the real leviathan) so that men will live up to their social contract out of fear of punishment. . . . All laws passed by the agreed-upon government become moral obligations; morality itself rests on the agreement--it is man-made and not found either in nature or in accordance with nature. Moral rules are legislated.<sup>13</sup>

Loyalty in this sense, would be in obedience to the government.

However, the government is one which is agreed upon. Although it can be argued that all governments exist at the express or implied consent of the governed, the implication here is that the contract is freely entered into, thereby establishing moral authority and, hence, loyalty.

#### The West Point Perspective

West Point was the single common experience of the four subject officers. This would not be so significant except that the school was unlike that of any other in the world at the time. Unlike its contemporaries of Ecole Polytechnique or Sandhurst, West Point had a four-year program of instruction. President Andrew Jackson referred to

the Military Academy as "the best school in the world."<sup>14</sup> There were basically three reasons for such assertions. First, the Military Academy had a strong emphasis on mathematics and engineering. This is evident in the statistic that 78 percent of all academic failures from 1833 to 1854 were due to deficiencies in math. Second, admissions were based on passing rigorous entrance exams. Each prospective candidate took a battery of oral tests at a blackboard in front of thirteen Army officers and the representative professor. The class of 1846 lost thirty of their 122 members to these exams in their first week at West Point.<sup>15</sup> Third, the school had a reputation for building character. The Board of Visitors to the Academy in 1820 remarked: "The situation at West Point is so favorable that there exists but few of the usual temptations to vice and dissipation."<sup>16</sup> Under the system instituted by Sylvanus Thayer from 1817 to 1833, the Academy developed a program of combined Spartan and Athenian values. Recognizing that the Athenian ideal of knowledge was virtuous, the Academy also leaned heavily on Spartan living conditions and discipline. The cadet's character was not only developed through rigid adherence to regulations, but also through mandatory attendance at chapel and classes in ethics.<sup>17</sup> The Board of Visitors concluded in 1820 that:

In all ages, military seminaries have been nurseries from which have issued the highest elements of character, and some of the most conspicuous agents in the operation of society.<sup>18</sup>

In this environment there were three frameworks of ethical training taking place. Each of these filled a role in the development of the cadet's personal ethics and ideas of loyalty.

First, formal training came in the way of chapel services and courses in moral science and moral philosophy.<sup>19</sup> In the institution's earlier years (1821) the course content was proscribed generally as to include natural and political law.<sup>20</sup> Later (1857), the detail was expanded so as to read:

*Ethics* will include, 1st, in its practical division, the duties, vices, and passions; 2d, in moral science, the pursuit of the *highest good* for each and all; the realization of excellence by virtue, the fulfillment of obligations to God, the country, to oneself and others; 3rd, in its applications, the connection of ethical principles with the higher exercises in rhetoric, and with the common basis of all law.<sup>21</sup>

Second, less formal training took place by the interaction of cadets with authorities in the system and compliance with written and unwritten rules--a sort of ethical laboratory in which the officers and instructors performed as role models and mentors. There was no written honor code in existence at the time, but adherence to a professional code of honor was expected.

The cadet of that day, like his officer counterpart, was expected not to steal or make false official statements and, if found guilty of either of these offenses, could be dismissed . . . the authorities trusted cadets, and the later, for their part, upheld that trust.<sup>22</sup>

At the time lying was considered an act of moral cowardice and an inappropriate trait for a future Army officer.

The informal training occurring in the daily life of a cadet gave rise indirectly to the third and perhaps most powerful agent in the development of a loyalty concept. The comradeship of undergoing common hardships is a tremendous factor in developing personal bonds. The plebe (first) year at the Military Academy was purposely severe and produced the side effect of strong devotion between classmates. A



particularly illustrative example of this class loyalty was the system of protecting a cadet who had been caught drinking. If the entire class pledged to abstain from alcohol until graduation, the offender would usually be retained. There is no recorded instance of a class failing to save one of its classmates under this system.<sup>23</sup> Over the course of four years, such feelings could only become firmly ingrained in the character of these young men. However, conflicting loyalties would cause 304<sup>24</sup> of these officers to resign their commissions and fight against their former classmates in the coming Civil War.

#### Modern Thoughts on Military Loyalty

Several modern authors have specifically addressed matters relating to loyalty in the military. Some of their ideas directly correspond to this thesis.

Samuel P. Huntington

Huntington believes that "the supreme military virtue is obedience."<sup>25</sup> An officer is to be judged by the efficiency of carrying out an order and by no other criteria. Concerning loyalty he states;

An officer corps is professional only to the extent to which its loyalty is to the military ideal. Other loyalties are transient and divisive. What appeals politically one day will be forgotten the next. . . . Within the military forces only military loyalty to the ideal of professional competence is constant and unifying: loyalty of the individual to the ideal of the Good Soldier, loyalty of the unit to the traditions and spirit of the Best Regiment. . . . Only if they are motivated by military ideals will the armed forces be the obedient servants of the state<sup>26</sup>

Huntington does allow for conditions of disobedience, but only in cases of clear immorality or violation of the law. He does not see the option

of a military professional disagreeing with national policy as in the following situation:

The commanding generals of the German army in the late 1930's, for instance, almost unanimously believed that Hitler's foreign policies would lead to national ruin. Military duty, however, required them to carry out his orders: some followed this course, others forsook the professional code to push their political goals. . . . the German officers who joined the resistance to Hitler . . . forgot that it is not the function of military officers to decide questions of war and peace.<sup>27</sup>

Samuel Huntington takes what could be termed a "black and white" view of military loyalty and leaves very little room for conflict.

Sir John Winthrop Hackett

In a lecture at the U. S. Air Force Academy, Hackett addressed several issues which reflect directly upon defining the concept of loyalty.

But in a constitutional monarchy, or a republic, precisely where does the loyalty of the fighting man lie? In Ireland just before the outbreak of World War I, there was a distinct possibility that opponents of the British government's policy for the introduction of home rule in Ireland would take up arms to assert their right to remain united with England under the crown. But if the British army were ordered to coerce the Ulster Unionists, would it obey? Doubts upon this score were widespread and they steadily increased. As it turned out, there was no mutiny, though the Curragh incident has sometimes been erroneously described as such. The officers in a cavalry brigade standing by on the Curragh ready to move into the north of Ireland all followed their brigade commander's example in offering their resignations from the service. The Curragh episode, all the same, formed an unusually dramatic element in an intrusion by the military into politics which seriously weakened the British government of the day and forced a change in its policy . . . it also raised the question of where personal allegiance lay and raised it more sharply than at any time since 1641, when the hard choice between allegiance to the king and adherence to Parliament, in the days of Thomas Hobbes, split the country in the English Civil War.<sup>28</sup>

Hackett contends that the ethical correctness of any disloyalty is judged primarily by the consequences of the act and concludes the topic

with an appropriate quote from Sir John Harrington in the days of Queen Elizabeth I, "Treason doth never prosper. What's the reason? For if it prosper none dare call it treason."<sup>29</sup>

Michael O. Wheeler

Wheeler postulates that loyalty is a type of relationship between entities and uses the illustration of the military superior to a subordinate.

Like many other abstractions, loyalty is an often confusing, much abused concept. . . . Whenever we speak of loyalty, we are speaking of a two-object context: a context in which one gives loyalty and another receives loyalty. Now, given this rather simple conceptual picture, what we might focus our attention on is neither the giving nor the receiving of loyalty but instead the *inspiring* of loyalty. That is to say, put yourself in a commander's position and ask, "What inspires men to be loyal to me?" Once the semantical issues are sifted through, there will remain, I would suggest, a single theme which forms the answer to that question. The theme is "trust."<sup>30</sup>

Malham M. Wakin

Wakin alludes to loyalty as a form of making obligations and also addresses the problem of conflicting obligations. He states,

. . . a freely given commitment generates one of the strongest moral claims against the person who gives it whether that commitment be to private individuals or to a larger segment of society. . . . One easily sees that promise-keeping is the kind of human act that can be universalized and that keeping one's word involves treating other human beings as ends-in-themselves, beings with dignity whose worth is recognized when our commitments to them are honored. . . . If one is morally bound to keep his promises, then he takes on a moral commitment to obey . . . when he takes the military oath of office . . . we are justified in violating one of our moral obligations just when that obligation is in conflict with another, higher obligation and the circumstances are such that we cannot fulfill both.<sup>31</sup>

Wakin continues to expound upon the problem of conflicting obligations and provides the basis for making a decision in such circumstances.

Our rule of action is that we are justified in violating our universal moral obligations only when they conflict with a higher obligation and we cannot fulfill both at once. Thus if one is torn between obedience to an order and fulfillment of another moral obligation, he or she must judge which is the higher obligation in those circumstances. Universal obligations are neither absolute nor relative. They bind all human beings in analogous sets of circumstances, but they may conflict.<sup>32</sup>

### The Basis for Loyalty in the Military

The U. S. military's current foundation for loyalty is based on the oath officers take upon commissioning. This oath reads:

I, \_\_\_\_\_, having been appointed an officer in the Army of the United States, do solemnly swear (or affirm) that I will support and defend the Constitutions of the United States against all enemies, foreign and domestic; that I will bear true faith and allegiance to the same; that I take this obligation freely, without any mental reserve or purpose of evasion; and that I will well and faithfully discharge the duties of the office upon which I am about to enter;  
SO HELP ME GOD.<sup>33</sup>

Although loyalty is not expressly stated in the oath, it is evident in the phrase ". . . I will support and defend the Constitution of the United States . . . that I will bear true faith and allegiance to the same" The terms support, defend, faith, and allegiance combine to give a practicable meaning to the word loyalty. The very last words of the oath, "SO HELP ME GOD," appeal to the highest possible authority to oversee this commitment and in so doing, emphasize the gravity of the statement. The implication is that the loyalty expressed in this oath is binding in such a way as to make a violation a matter of divine importance. In the recent past (1991), the Army has named loyalty as being one of the four professional values of the Army ethic (the other three being duty, integrity, and selfless service). This Army ethic is described as "the informal bond of trust between the nations and its soldiers." Further, "it sets standards by which we and those we serve

will *judge our character and our performance.*" (italics added)<sup>34</sup> The Army goes on to include in the definition of this standard such phrases as ". . . *an obligation to support and defend the Constitution . . . supporting the military and civilian chain of command . . . an expression of the obligation between those who lead, those who are led, and those who serve alongside the soldier . . . devotion to the welfare of one's comrades . . .*"(italics added). Although not defining, loyalty to the nation, to the Army, to the unit, and to the individual soldier is spoken of as being essential.<sup>35</sup>

#### Loyalty - An Operational Definition

For the purposes of this paper, the operational definition of loyalty must consist of four components. The first is that loyalty is a moral obligation based upon trust between two entities. This can range from the mutual trust felt between a superior and subordinate all the way to a citizen's trust that the government will function as it should. The second component is that there are a number of different objects to which one can be loyal, such as self, people, ideals, governments, etc.. Third, there is a hierarchy of these objects which will determine which takes precedence when two or more are in competition. And last, how an individual sets up the hierarchy will almost automatically determine the answer to (or actions associated with) any loyalty question.

This definition will be applied to the analysis of the four subject officers and in the answer to the thesis question.

## Endnotes

<sup>1</sup>Webster's Ninth New Collegiate Dictionary, 1984 ed., s.v. "Loyalty, Loyal," 708.

<sup>2</sup>Ibid., 460.

<sup>3</sup>Ibid., 446.

<sup>4</sup>Genesis 9:9-19.

<sup>5</sup>Genesis 17:4-14.

<sup>6</sup>Genesis 22:2-18.

<sup>7</sup>Exodus 19:5-6.

<sup>8</sup>Exodus 20:3-12.

<sup>9</sup>Deuteronomy 31:16.

<sup>10</sup>Jeremiah 3:6-9.

<sup>11</sup>John 14:23.

<sup>12</sup>Richard H. Cox, *Locke on War and Peace* (Oxford, G. B.: Clarendon Press, 1960), 82.

<sup>13</sup>Malham M. Wakin, *War, Morality, and the Profession of Arms*, Second ed., s.v. "The Ethics of Leadership II," 202-203.

<sup>14</sup>James L. Morrison, Jr., *"The Best School in the World"* (Kent, Ohio: The Kent State University Press, 1986), 27.

<sup>15</sup>John C. Waugh, *The Class of 1846* (New York: Warner Books, 1994), 13.

<sup>16</sup>John P. Lovell, *Neither Athens nor Sparta?* (Bloomington, Indiana: Indiana University Press, 1979), 19.

<sup>17</sup>Ibid., 17-19.

<sup>18</sup>Ibid., 18.

<sup>19</sup>Morrison, 161.

<sup>20</sup>General Regulations, *General Regulations for the Army; or Military Institutes* (Philadelphia: M. Carey and Sons, 1821), 330.

<sup>21</sup>General Regulations, *Regulations for the U. S. Military Academy* (New York: John F. Trow, 1857), 17.

<sup>22</sup>Ibid., 82.

<sup>23</sup>Ibid., 79.

<sup>24</sup>Ellsworth Eliot, Jr., *West Point in the Confederacy* (New York: G. A. Baker & Co., 1941), xii.

<sup>25</sup>Samuel P. Huntington, *The Soldier and the State* (New York: Vintage Books, 1957), 74.

<sup>26</sup>Ibid., 74.

<sup>27</sup>Ibid., 77.

<sup>28</sup>Sir John Winthrop Hackett, *War, Morality, and the Military Profession*, Second ed., s.v. "The Military in the Service of the State," 114.

<sup>29</sup>Ibid., 117.

<sup>30</sup>Michael O. Wheeler, *War, Morality, and the Profession of Arms*, Second ed., s.v. "Loyalty, Honor, and the Modern Military," 174.

<sup>31</sup>Malham M. Wakin, *War, Morality, and the Profession of Arms*, Second ed., s.v. "The Ethics of Leadership I," 189.

<sup>32</sup>Ibid., 196.

<sup>33</sup>FM 100-1, June, 1994 ed., s.v. "Chapter 1 The Profession of Arms," 11.

<sup>34</sup>FM 100-1, December 1991 ed., s.v. "Chapter 4 The Profession of Arms," 15.

<sup>35</sup>Ibid., 15-16.

## CHAPTER 3

### THE GENERALS

This purpose of this chapter is to investigate the conditions leading to the decision of John C. Pemberton, Robert E. Lee, Thomas J. Jackson, and E. P. Alexander to fight for the Confederacy. The ancestry, early life, West Point years, service experience, and the events surrounding the decision of each officer will be addressed in order.

#### John Clifford Pemberton

##### Ancestry

Ralph Pemberton departed Radcliffe Bridge, Lancaster County, England with his son Phineas and family to escape religious persecution and arrived in America in the year 1682.<sup>1</sup> They were devoted followers of William Penn the Quaker (Pennsylvania's namesake), frequently traveling in his company. In those times Quakers were distinguished by their non-violent lifestyle, simple dress, and communal discipline. Phineas' only surviving son Israel eventually moved to Philadelphia and became a successful merchant and community leader. Although an acclaimed leader in the Quaker church, he began what was to become a gradual religious liberalization of the Pemberton family by his purchase of Clarke Hall, a mansion that would become known for its lavish grounds. His son Israel Jr. was born in 1715 and carried on the family



business as well as continuing in the Quaker faith. He especially embraced the pacifist doctrine while promoting peace with the local Indians. This attitude continued with his opposition to the American Revolution when he was jailed and then exiled from Pennsylvania. Israel Jr.'s third son Joseph was born in 1745, later marrying Sarah Kirkbride and further liberalizing the family with the introduction of social dancing.<sup>2</sup> Their youngest son John (one of eight children and the future father of the subject) was born in 1783. John married Rebecca Clifford, the only child from a wealthy family of British and Dutch descent. Rebecca was a practicing Quaker although of a decidedly liberal persuasion. John, a Christian in principle, did not entirely embrace Quaker doctrine and became the first of the American Pembertons to see military service. He enlisted in the Pennsylvania volunteers during the war of 1812 but saw little, if any, combat action. After the war John traveled widely while earning his living as a land speculator. During his journeys he met and befriended Andrew Jackson from whom he later received an appointment as naval officer for the district of Philadelphia.<sup>3</sup>

### Early Life

John Clifford Pemberton was born on August 10, 1814, the second son of thirteen children.<sup>4</sup> He was a typical boy of the times--active, rowdy, and tended to behave impulsively. He spent much time with his older brother (by fifteen months) Israel and their friendship continued throughout their lives. Their fathers' frequent absences led to numerous admonitions by mail that were taken to heart by both boys.

They were advised to be kind, obedient, and polite, especially to their mother, and urged to read their Bibles. Soon the boys needed a proper education. Their mother enrolled them in a private academy where John excelled in exposition, Latin, and French, but complained about grammar and geography. As John grew older he thrived in the environment of Philadelphia, a city well known for its ties with the southern states. The populace of the city had strong patriotic feelings and John occasionally reenacted battles with his friends. The sentiments of slavery excited and polarized strong emotions in the city. White resistance to the antislavery movement resulted in the burning of an abolitionist headquarters in 1838. John, meanwhile, concerned himself with the more immediate issue of his own education. He prepared for and entered the University of Pennsylvania in 1831 after some difficulties with the entrance exams (he was deficient in Greek). During this time John began to consider the possibilities of entering West Point. Some influential friends of the family recommended him to the Secretary of War Lewis Cass, but John eventually asked for and received an appointment directly from President Andrew Jackson. After completing two years at the University of Pennsylvania, John, the "five-foot, ten-and-a-half-inch tall . . . handsome boy with black curly hair; genial, companionable . . . with a decided talent for drawing and painting," departed for the U. S. Military Academy at West Point on the Hudson river.<sup>5</sup>

## West Point

Major Rene de Russey was the superintendent in 1833, the year John entered the Academy. Major de Russey was considered a somewhat lax disciplinarian, a factor that may have contributed to John's pleasure in his new surroundings. However, the academic rigors of West Point proved challenging to young John as he managed to maintain a standing only slightly above average. He excelled in drawing and French, but his math classes left much to be desired. Dennis Hart Mahan taught math and engineering at the time and was not too popular with the cadets.<sup>6</sup>

John's parents constantly critiqued his grades and his accumulated demerits. This family friction was cause for numerous heated exchanges (by mail) and his mother even suggested he quit if he could not improve. John showed his tenacity by his reply,

I would rather have my hand cut off tomorrow and I beg you will not speak to me of it again. I would not resign with my own will if you could give me twenty thousand dollars for doing so.<sup>7</sup>

Perhaps John's parents had correctly assumed that his social life and frequent attendance at parties were having a negative influence on his grades. Although bickering was frequent, John was very close to the rest of the Pemberton family, especially his brother Israel and sister Anna. During this time the territory of Texas rebelled against Mexico and several cadets left to fight in the conflict. John might have gone also but he deferred to the wishes of his family. He wrote to his sister "I would not be doing my duty to my parents or properly returning their affection." Not surprisingly, John's thoughts often centered on women. He entertained them whenever possible and in the summer of 1836 (between his junior and senior years) met an attractive sixteen-year-old

from New York City, Angeline Stebbins. After only a three-day acquaintance they determined to make their relationship permanent as soon as practicable after John graduated. Both of their families disapproved, but they were young and in love and determined to have their way. John, however, incurred professional difficulties that nearly ended his military career. While on duty as orderly, liquor was discovered in the barracks and John was arrested for violating regulations. He professed innocence and refused to testify against other classmates who were also charged. John's father naturally chastised him for not doing his duty to which he replied,

I am sorry, very sorry, you think me wrong--but I repeat that I would suffer any disgrace that a court-martial could inflict on me before I would commit an action which has far more disgrace to it in my opinion than if I were twenty times dismissed from this Institution<sup>8</sup>

John's loyalty to his friends took precedence over the form all cadets signed promising to obey regulations. The entire class signed a petition vowing not to drink for the remainder of their cadet days and (recently promoted) Colonel de Russy dropped all charges. This incident was not atypical of cadet friendships at the Academy. During his cadet days John's best friend was another Philadelphia youth, George Meade. George was two years his senior and John would never again have such a close friend. John Pemberton graduated from West Point in 1837, twenty-seventh out of a class of fifty. He never lost his affection for this school on the Hudson river.<sup>9</sup>

## Service Years

Second Lieutenant John Pemberton was commissioned into the Fourth Regiment of the U. S. Artillery and assigned to Fort Hamilton on Governor's Island, New York.<sup>10</sup> This allowed him to continue his courtship of Angeline and arouse further displeasure from his mother over the issue. The problem soon fell victim to national events as John was transferred to Florida to participate in the Seminole wars. He saw considerable activity and became quite homesick, but his interest in Angeline began to wane. John managed a short visit home where Angeline expressed her displeasure with his absence and pushed for his resignation from the Army. John contended that the Army was his profession and he had no intention of leaving it.<sup>11</sup> On his return to Florida he was given the command of an ordnance depot. During this time he became very interested in his family's plans to buy property in Virginia. He even told them that he would like to become a Virginian by adoption. His relationship with Angeline continued to decline when he met another woman and rapidly decided that he would like to marry her instead. John attempted to get his father to break his engagement with Angeline, but John finally wrote and told her that they should annul the engagement for reasons other than his affection for her. This nearly caused her brother to challenge John to a duel. Meanwhile the new girl's father, an Army captain, threatened to disown her if they continued to see each other and the affair died. Fortunately for John, he was transferred to Fort Washington, New Jersey, where he would be much closer to the stabilizing influence of his family.<sup>12</sup> He spent a considerable amount of time with his family and obtained a new, although

less serious, girlfriend. His homecoming was relatively short lived and he received a new posting to Mackinac Island, near Detroit, on the Canadian border. Frontier life did not agree with John and he slipped into financial troubles while entertaining more ladyfriends (presumably from the Detroit area). In a letter home to his mother he states,

I am extravagant to excess, even when I know I ought not to spend a cent beyond the absolute necessities I require, & yet at this moment I have not even a decent suit of clothes to show for my money. I throw away in a moment without thinking all that I owe & should send to you. I am disgusted with myself.<sup>13</sup>

At this time he did not think very highly of the opposite sex and spoke of them to his sister, "the more I see of women generally, the less I think of them. Marriage seems to be the sole object of their thoughts."<sup>14</sup> Relief came in 1842 when he was transferred to Fort Monroe, Virginia. He was again close to home and became involved in the social life of the region. Here he met Martha Thompson (nicknamed Pattie) the daughter of a wealthy Norfolk shipping family. She easily captivated John and (even though she was aware of his former female liaisons) they were soon engaged. However marriage would not come quickly.

Troubles with Mexico brought orders to Texas and John departed for Corpus Cristi. The political maneuvers between the U. S. and Mexico took much time and John earnestly wrote his family encouraging them to make Pattie feel welcome. When war came he accompanied the main force to Matamoros and fought in the battles of Palo Alto and Resaca de la Palma. Even though surrounded by the horrors of war, he was exhilarated by the experience. He wrote to his father, "I really like this part of my profession better than any other. I would not have

missed the two fights for the world, nor will I any more that are to come if I can help it."<sup>15</sup> He was breveted to the rank of captain for gallantry at Monterrey, but as the war began to drag on he became homesick and wished for the war to end. His anxiety worsened with the prolonged illness and death of his father in early 1847. General Winfield Scott launched his campaign for Mexico City in the spring and John served as aide-de-camp to division commander General William Worth. Perhaps he was still upset over his father's death or maybe the pressure of his job was weighing heavily for he had several confrontations with his commander and submitted his resignation. Things improved, however, and he withdrew his resignation. Sometime during this campaign, a story concerning John reached another young officer, Ulysses S. Grant. Many years later he recalled the episode:

A more conscientious, honorable man never lived. I remember when a general order was issued that none of the junior officers should be allowed horses during the marches, Mexico is not an easy country to march in. Young officers not accustomed to it soon got foot-sore. This was quickly discovered, and they were found lagging behind. But the order was not revoked, yet a verbal permit was accepted, and nearly all of them remounted. Pemberton alone said, 'No,' he would walk, as the order was still extant not to ride, and he did walk, though suffering intensely the while. . . . Yes, he was scrupulously particular in matters of honor and integrity.<sup>16</sup>

John was breveted to major for his actions around Molino del Rey. About this time he learned that his youngest sister Sarah had died of consumption--the same illness which took his father. As the war again wound down he became despondent and feared that it would never end. He was arrested as part of a letter writing scandal (several generals had written various letters, each making claims as to their roles during the

war) but later released. He finally returned to the east coast in December of 1847.<sup>17</sup>

John promptly married Pattie in January of 1848 but none of his family attended the wedding. Pattie later said that perhaps the in-laws were hesitant about having a southern girl in the family. However the Pembertons soon grew to appreciate the good influence Pattie was having on John. She insisted on responsible money management and her mother-in-law wrote to son Israel, "She is the very woman for him and we all love her more every time we have her here."<sup>18</sup> John meanwhile remained as General Worth's aide, traveling often and incurring numerous expenses. Pattie quickly became pregnant and experienced a difficult delivery. She was ill for several weeks before delivery and went into a coma. The baby died before Pattie regained consciousness. Shortly thereafter John's sister Mary also died. John did not have long to dwell on these things as he was ordered to the frontier post of San Antonio, Texas. Upon arrival he decided that he could not bring Pattie to such an austere environment and so requested and received a transfer back to Norfolk, Virginia enroute to Florida. John and Pattie lived in several locations and their daughter Martha was born at Fort Brooke in Tampa Bay on January 14, 1850. Next they were sent to New Orleans where John was put in command of Jackson Barracks and subsequently promoted to captain. During this time John had the opportunity to observe slavery first hand and made comments of the institution in several letters home, referring to slaves as "lazy plantation negroes" and stating "the more I see of slavery the better I think of it."<sup>19</sup> Transfers came again, first to Fort Hamilton, New York, and then to Fort Washington on the Potomac.



There they had servants, including a black cook given to Pattie by her father as a gift. Pattie often attended church while John baby-sat and soon another daughter, Mary (named after John's deceased sister) was born. John heard much of politics in Washington and commented in particular on a tour by Hungarian rebel Louis Kossuth--" I have never been more disgusted in my life with the impudence of this country than I have since his presence in it."<sup>20</sup> John considered him a traitor to the legitimate government of Hungary and felt the U. S. was wrongly supporting him. The family was transferred back to Fort Hamilton where there first son was born in January of 1853. John frequently prayed during these anxious births and, although he did not care much for organized religion, believed in a supreme being. The year 1853 would see many trials coming to the young family, the first being an attempted assassination of John by a disgruntled soldier. Next two nephews died within days of each other followed later by another nephew. His own two-year-old daughter Mary died in September and both John and Pattie contracted prolonged illnesses during the summer. Then John had a conflict with a senior officer and was arrested for insubordination, a charge which was soon dropped.<sup>21</sup> The situation gradually improved and a son was born in December 1853 followed a few years later by another son in 1856.

John was transferred back to Florida to deal with Seminole problems and then to Fort Leavenworth to participate in the Utah expedition against the Mormons. The family moved also and Pattie didn't care much for frontier life, although their older children had fond memories of life in the West. Their seventh child, Anna, was born in

1858, just in time to accompany the family to their new posting of Fort Ridgely, Minnesota in 1859. Life in the northern territories was fairly monotonous and routine with little to offer in the way of socializing or creature comforts. With slow mail and the isolation of Minnesota, the worsening political situation in the country must not have seemed very real. The John Pemberton family soon would be caught up in these events when John's regiment was recalled to Washington, D.C. in 1861.<sup>22</sup>

#### The Decision

John was assigned in Washington, D. C. when Fort Sumter was fired on by secessionist troops in Charleston, South Carolina. Patty and the children had proceeded to Norfolk. The reason for this is not documented and open to speculation, but clearly Patty intended to reside in Virginia regardless of the state's status in the Union. The situation in some northern cities became feverish and mobs frequently sought out suspected southern sympathizers; giving them the choice of flying the Stars and Stripes or having their homes razed.<sup>23</sup> On the 15th day of April, Israel penned the following to John:

I think if you were here a little while, you would feel that you and your ancestors were Pennsylvanians, and that your destiny, in case of a dissolution of the general government should be with Penn. Governments may change but to our country we owe I think a never swerving allegiance.<sup>24</sup>

On the same day Abraham Lincoln called for 75,000 volunteers to put down the insurrection in the South. Israel attended a party that night and heard rumors that John had already resigned. He added a postscript to the letter (as yet not mailed) urging his brother to remain loyal and adding ominous threats that if he defected to the South all would

consider him a traitor and he would never be able to come home again. He told him that, "You wouldn't even have the poor apology of your state going out of the union for forsaking the government and laws you've sworn to protect."<sup>25</sup> On the 17th of April Virginia seceded from the Union. This did not, however, cause John to resign immediately. On the 19th of April he received orders to seize steamers along the Potomac river which he promptly carried out. Perhaps the dilemma John Pemberton faced can be understood best in a letter written by his mother to another daughter-in-law on the 23rd of April 1861:

Yours of the 20th, dear Carry, has just come to me and though I wrote to you yesterday, yet I know you are both anxious to hear all. Your husband got home this morning, but alas he brings but faint hopes--he says that nothing but John's affection and feeling for us, prevents him from resigning--his ideas of duty and honor are all the other way, and he is perfectly honorable and open in all he does--his feelings are well known to his brother officers--if your husband had not gone to him, he would probably have resigned this first night he got there--but he begged and pleaded with him, telling him how we all should suffer if he did it, and he has postponed it for the present--at least did not act upon it while he was there--As long as he remains, he will do he says, anything he is ordered to, excepting going to attack and fire upon Norfolk--if he is ordered to do *that*, he would resign at once--he is perfectly willing to stay and protect "Wash.," in which he says the Government is right. The first day John got there, he was sent for to the War Department and received orders to go and seize some steamboats, which were at the wharves--he collected his men, marched them some distance off and then ordered them to load their muskets, and told them what it was they were going to do, and if anybody opposed them, they were to fire upon them--they set off in a quick run, jumped on board the boats---John seized the rudder and the boats were theirs--he was selected for this service, expressly to try him, he knew it--and was perfectly willing to perform any duty, except going to Norfolk--John is most dreadfully distressed and worried, *on our account*--for his heart and views are that the South is right and we are wrong--he says Patty's family (that of his wife) have never spoken or written on the subject to him--but while your husband was there a letter came to John from Patty, in which she says "My darling husband, why are you not with us? Why do you stay? Jeff Davis has a post ready for you"--in answer John spoke of the hard position he was in and enclosed the letter which I had written to him, in order that his family might see what a sore thing it was for him, so to grieve us

all--your husband also wrote to Patty, in which he used every argument to convince her what a serious thing it would be for John's future, and besought her to advise him remaining with the Government.

"I have been more wretched in this horrid state of suspense than words can tell. I feel that if this grief and mortification *must* come upon me, that I must accept it, and submit to it--we have done all we can--John firmly believes it would be the most honorable and right--'tis only for us he hesitates. "I have a great fear now, that so many of the officers knowing John's sentiments, they may take some summary steps with him, and dismiss him before he resigns. Of the two cases, that would be the worst. Some begin to think that after all, there may be no fighting--pray Heaven it may be so. "Do let me hear soon again--love to Harry Your poor worried MOTHER"<sup>26</sup>

On the 24th of April 1861, John Pemberton submitted his resignation as a captain in the Army of the United States. However, General Winfield Scott delayed the paperwork and requested an explanation in person. During the next several days Scott offered him a Colonel's commission if he would remain, and he learned that his younger brothers Clifford and Andrew had joined the Philadelphia City Troop, a cavalry unit loyal to the Union. In spite of these developments, John persisted in his convictions and departed for Richmond and the Confederacy.

#### Edward Porter Alexander

##### Ancestry

Edward's ancestral roots began in Georgia prior to the American Revolution. His father Adam served as a surgeon's mate in the Second Georgia infantry during the war of 1812 and was captured and interred by the British. After the war he acquired land and slaves in Liberty County, Georgia and prospered as a planter and eventual banker. He attended Yale (where he met his future wife) and became a model "southern gentleman planter" typical of the aristocracy in the southern states. He embraced the Presbyterian denomination and habitually read

the Greek New Testament daily. Adam felt that part of his Christian duty was ensuring that he did not trifle away his God given talents and in this he was quite successful. He was particularly credited with having a profound sense of integrity coupled with a transparent personality. This made Adam well liked by virtually all of his acquaintances. His views were conservative and, although he did not involve himself personally, he followed politics as a matter of good business.<sup>27</sup>

Edward's mother Sarah traced her family roots to the Hillhouses of Connecticut and the Gilberts of Virginia. Members of these families moved to Georgia in the late 1700's and pursued livelihoods as merchants and planters. Sarah was orphaned while quite young and was raised by her grandmother. This Presbyterian woman had strict ideas of discipline and duty which would impact deeply on Sarah's personality. Sarah received her education in New Haven, Connecticut, where she met Adam while he was at Yale. A perfectionist, Sarah would never consider herself worthy as a wife or mother, even though the evidence all indicates otherwise. She was physically small (about 100 pounds) and plagued by numerous illnesses of which she eventually succumbed.<sup>28</sup>

Adam and Sarah were married in 1823 and moved to a plantation inherited by Sarah. They worked well as a team in managing two plantations while rearing their ten children. They manifested a deep devotion to each other which was readily apparent to the children. Their letters contain frequent expressions of this relationship. Sarah once wrote,

I am sure I shall be happier, my dear husband, when you come back than I have ever been in my life, for I gave only now fully found how necessary your presence is to my happiness, and how dependent I am on you for all my enjoyments.<sup>29</sup>

Similarly, Adam penned,

How soon does a short absence convince me that my entire earthly happiness rests upon you. With you, is embarked my all--& without you, I am nothing.<sup>30</sup>

Along with their example of personal relationship, Adam and Sarah provided a home emphasizing their own tenets of discipline and education. This homelife would naturally have varied effects on all of the Alexander children.

#### Early Life

Edward Porter Alexander was born on 26 May, 1835 as the sixth of an eventual ten children. As a boy he was ardently devoted to shooting and fishing. He spent much time with two elderly men who mentored him in these two activities. Seventy year old Frank Colley was a constant fishing companion.<sup>31</sup> Edward was similarly schooled in the arts of hunting by the elderly James Dyson. His devotion to these two pursuits was so intense that he became rebellious towards the system of authority at an early age. Edward resented religion for its infringement upon his freedom. At nine years of age he ran away from home with the idea of subsisting on trapping and hunting but only lasted a day in the nearby woods before returning home with hunger pangs.<sup>32</sup>

Edward received the finest education that circumstances would allow in rural Georgia. His father had earlier enlisted Sarah Brackett of Massachusetts (who later married a Boston preacher noted for writing a response to *Uncle Tom's Cabin* entitled *A South Side View of Slavery*)

to tutor Edward's older sisters. Later he hired Dr. A. M. Scudder of Vermont and then Russell Wright of Easthampton, Massachusetts to instruct the boys in the fundamentals as they came of age.<sup>33</sup> The idea of secession first came to Edward on the banks of the Little River in 1848. Frank Colley explained the feelings of the time and Edward later penned, "the pang the idea sent through me, & my thinking that I would rather lose my gun--my dearest possession on earth--than see it happen."<sup>34</sup> His anti-secession sentiments continued until an incident which occurred during an election of delegates for a state convention. Edward strongly supported the unionist delegate. In his words,

My feelings were so much enlisted that I got into a quarrel with two of the "town" boys, Jim Hester & Ben Kappell, which came very near ruining my life. I was told that these two had armed themselves with pistols & intended to ship me, I borrowed an old "pepper-box" revolver from our "overseer," John Eidson, loaded it heavily, & got 6 special "Walker's Anticorrosive Caps" for the nipples, instead of the common "G.D.'s." It would be too long to detail the quarrel, but, indignant at being bullied by two older & larger boys, I at last came into collision with Jim Hester. He struck me over the head with a light "skinny-stick," breaking it. I drew my revolver &, aiming at his breast, pulled the trigger. It snapped failing to explode the cap. Hester drew a single barrel pistol, while I tried another barrel, which also snapped. This second failure made me think that the Walker caps were made of copper too thick for the hammer of my pistol, & that all six barrels would fail. At the same time--while he had drawn a pistol, Hester paused a moment, & made no motion to aim or fire at me. This made me pause in the very act of pulling the trigger for a third trial: for I thought that if I continued to try to shoot, it would make him shoot, & that my pistol would continue to fail on account of my thick caps while his might not. I therefore stopped pulling on the trigger & waited to see what he would do. On this other boys ran in & took both of our pistols away. Someone said to the boy who took mine, "See if that pistol is loaded." He raised it over his head & pulled the trigger for the 3rd barrel (it was a self cocker). This time it went off loud & clear. . . . But gratitude to a Providence which saved me so narrowly from a calamity which would have ruined my whole life, has led me ever since to avoid & eschew politics, as too prolific of quarrels for one who, like myself, is liable to become reckless of consequences when in a passion.<sup>35</sup>

Edward was fifteen years old at the time.

Attending West Point was paramount in Edward's ambitions from his earliest recollections. This may have been due in large part to the marriages of two of his sisters to West Point graduates. His father initially frowned on the idea but acquiesced during the summer of 1850 upon the urging of his new son-in-law Lt. Alexander Lawten and future son-in-law Lt. Jeremy Gilmer. Edward and his father agreed that if Edward would promise to study hard enough to receive a commission in the engineers, then he would grant his blessing to the venture.<sup>36</sup> An appointment was difficult to obtain and Edward spent the next two years preparing and hoping for admission. He spent the winter of 1852-53 with the Lawtons (stationed in Savannah) studying French and drawing. Finally, in late spring of 1853, he bid his family farewell in Fairfield and began his journey towards West Point and the life of a cadet.

#### West Point

At his entrance physical, Edward Porter Alexander weighed 150 pounds and stood 5 feet 9.5 inches tall.<sup>37</sup> The new discipline had a marked effect on Edward and, after a visit in July, his brother Felix commented on Edward's newly acquired restraint and self control. He overcame the homesickness common to new cadets and compensated by performing his duties to exacting standards. Edward lived up to his agreement with his father and placed 4th out of the 58 left in his class (they began with 99) at the end of the first year.<sup>38</sup> His parents were concerned with his spiritual life, however, and admonished him to perform his religious readings and contemplation daily and especially to



attend to the Sabbath. Apparently, Edward listened to such advice for Chaplain Sproule wrote in a letter to Sarah:

His whole character is above reproach. All who know him speak well of him. And we regard him, as one of the few about whose Christian character, there is no doubt. . . . This is not flattery. I take great pleasure in writing it, for I believe it to be strictly true.<sup>39</sup>

Edward's quest for class ranking turned to excess and he took to studying long after taps which brought a quick rebuke from his parents. His mother wrote, "You must not feel that we expect so much from you that you must overtax yourself, & incur the risk of a broken constitution." <sup>40</sup> His mother did not follow her own advice and after a visit to the Academy (where she lay bedridden for 6 weeks) Sarah Alexander died in February of 1855. The following year understandably was not easy for Edward. He quarreled with a professor and accumulated numerous demerits. That summer, however, Edward was able to take the long awaited first furlough home. Here he awakened to the charms of the fair sex and was temporarily smitten by Miss Annie Church but as she did not return his affection the relationship died in infancy.<sup>41</sup> The next year was bittersweet as he attained the rank of orderly sergeant but distanced himself from his friends as he carried out his duties. His attempted disciplining of the freshman Fitzhugh Lee brought censure from the entire senior class.<sup>42</sup> During the spring of 1856 fights broke out between northern and southern cadets over the issue of slavery and states' rights. Edward backed his southern classmates. He had shown such sentiments earlier as a cadet and his mother had reprimanded him by letter before she died. She wrote:

These extreme prejudices are unworthy of liberal & enlightened minds, and are especially unbecoming one who has pledged himself to serve the country as a whole, & is therefore receiving an education from the government<sup>43</sup>

Edward was appointed a cadet captain for his senior year and again became interested in female companionship that spring. His father had heard rumors of such that winter and inquired disapprovingly. Edward assured him that the relationship (with a minister's daughter) was only a passing friendship. His father took a dim view of the possibility of Edward becoming entangled with the fairer sex and wrote:

The increase in pay for the army is pretty respectable, & will now afford you a fine & liberal support, with means to lay up a little every year, unless you are foolish enough to throw yourself away in a marriage & fix your nose to a grindstone.<sup>44</sup>

Edward had no immediate ideas along these lines and tended to his studies. He graduated in June of 1857 3rd in his class and received a commission as a second lieutenant in the elite corps of engineers.

#### Service Years

Edward's first assignment was as an assistant instructor of practical military engineering. For three years he remained at West Point except for two six month special details. His first departure from the Academy was in response to what became known as the "Mormon War" in Utah.<sup>45</sup> Although the war ended before his detachment arrived. Edward thoroughly enjoyed the adventure of scouting a new route to Fort Bridger and hunting antelope, wolves, and buffalo. He returned to West Point and, during the following summer of 1859, met Bettie and Gussie Mason who had come north from Virginia for the summer. Edward and Bettie quickly became more than friends and by the end of the summer became engaged. Edward's father was not consulted on the matter and a

temporary rift developed over the issue.<sup>46</sup> In October he was assigned to another special duty, this time investigating a new system of military signaling which eventually resulted in the establishment of the signal corps. This work required his presence in the nation's capital and political sentiments over the sectional conflict were growing feverish. He wrote his father:

If it does come to war, you will have one son in it from the commencement, bearing a musket in the ranks if nothing else & if Seward is President, his first act shall be signing my resignation.<sup>47</sup>

In March of 1860 his father finally relented on the marriage issue and gave Edward and Bettie his blessings. They were married April 3rd at "Cleveland," the estate of her uncle in King George County, Virginia.<sup>48</sup>

Within a week of their return to West Point Edward received orders to report to Fort Steilacoom in Washington Territory. He had expected some sort of new assignment and had even been requested by the Army's new signal corps officer to be assigned to join him in New Mexico. But Edward did not care for making personal decisions and preferred to be told what to do. As he explained to his father, he hesitated to decide "because I did not like to assume any responsibility in placing myself in a situation where so much would be risked by & upon me."<sup>49</sup> He proceeded with his bride (and their combined house girl/cook Anne) by side wheel steamer through Panama and arrived at Steilacoom City on the 20th of September 1860. Although they were given the ship's bridal suite from Panama to San Francisco, Bettie developed a fever and remained ill for the rest of the trip.<sup>50</sup> The post was a virtual utopia for Edward. Post life was not taxing and the virgin territory abounded

with all manner of game and fish. Life could hardly have been more idyllic for the young newlyweds and he later wrote of the time:

"Never to, or during that time, did I begin to realize what care & responsibility may mean. I had a position for life, & an assured support in the profession I loved; & I had only to get the most pleasure that I could out of my surroundings . . . my company duties were very light, & I had plenty of time for shooting, fishing, playing chess, & for social pleasures."<sup>51</sup>

But the clouds of war loomed on the horizon and the honeymoon would soon be over.

### The Decision

Events in the East were gathering headway and most of the post inhabitants met each bearer of news (of events at least three weeks old) with anxiety. Edward, however, seemed unconcerned. He later wrote:

I took but little interest in politics. If the South seceded she would want an army & I would . . . secure a place in it. If there was peace that was well & good; & if there was war I would see active service, which was even better. So I troubled my head not at all about what they did in the East.<sup>52</sup>

However, he had written to his sister in November:

We suppose from the latest news that Lincoln is elected, and if so I hope and expect to be called in to help secede. . . . If he is elected I believe the interests of humanity, civilization, and self-preservation call on the South to secede, and I'll go my arm, leg, or death on it.<sup>53</sup>

Tensions continued to mount--February brought news that Georgia had seceded, and in March Edward received orders back to West Point. Edward penned later:

Of course as soon as the news of the secession of Georgia reached us at Fort Steilacoom, some three or four weeks after the event, I knew that I would finally have to resign from the U. S. Army. But I did not believe war inevitable & I felt sure I could get a place not inferior in a Southern army, & I really never realized the gravity of the situation. As soon as the right to secede was denied by the North I strongly approved of its assertion & maintenance by force if

necessary. And being young & ambitious in my profession I was anxious to take my part in everything going on.<sup>54</sup>

Edward and Bettie (and Annie) departed Fort Steilacoom on April 9th along with others of the command ostensibly enroute for West Point. Edward had planned on resigning once he had returned to the East coast and thereby save the expense of the trip. However, he received new orders when they arrived in San Francisco assigning him to Lt. James McPherson on Alcatraz Island for the construction of fortifications. Realizing the problem this would cause with his plans, went to McPherson and asked if he would forward his resignation and give him a leave of absence, thereby allowing his further passage at government expense. In later years Edward recalled the response in vivid detail:

if you must go I will do all I can to facilitate your going. But don't go. These orders, sent by pony express to stop you here, are meant to say to you that if you wish to keep out of the war which is coming you can do so. You will not be required to go into the field against your own people, but will be kept out on this coast on fortification duty . . . this is not going to be any 90 days or six months affair as some of the politicians are predicting. Both sides are in deadly earnest . . . & [to be] fought out to the bitter end . . . you are sure to be put in the front ranks & where the fighting will be hardest. God only knows what may happen to you individually, but for your cause there can be but one possible result. It must be lost . . . the individual risks you must run . . . are very great. On the other hand, if you stay out here you will soon be left the ranking & perhaps the only engineer officer on the Pacific Coast . . . you will get promotion . . . you will have charge of all the government reservations . . . buy a flock of sheep . . . and in four years you will be a rich man . . . you will be able to make good investments. . . . In short, remaining here you have every opportunity for professional reputation, for promotion & for wealth. Going home you have every personal risk to run & in a cause foredoomed to failure.<sup>55</sup>

Edward recalled his reply as follows:

My people are going to war. They are in deadly earnest, believing it to be for their liberty. If I don't come and bear my part, they will believe me to be a coward. And I shall not know whether I am or not. I have just got to go and stand my chances.<sup>56</sup>

So Edward returned to his room. There, while Bettie wept, he wrote out his resignation, dating it for the 1st of May 1861.<sup>57</sup> Then Edward, and his wife of just over a year, left for their future with the Confederacy.

### Thomas Jonathan Jackson

#### Ancestry

The Jackson's had their origins in the lowlands of Scotland.<sup>58</sup> Possibly due to religious pressure, they moved to Ulster in Northern Ireland and from there to London. The family came upon hard times leaving John Jackson an orphan at an early age. Then, as a young man, he emigrated to America in 1748. In Maryland John met and married another orphan from London, Elizabeth Cummins.<sup>59</sup> By 1769 they had established a family and obtained a claim of ground along the Buckhannon River near the future site of Weston, West Virginia.<sup>60</sup> John's Scotch-Irish heritage left little room for loyalty to the British and he with sons Edward and John G. fought for American independence in the Revolutionary War. After the war John prospered and acquired large tracts of land. His son Edward continued the growing affluence of the Jackson name, serving in the Virginia Legislature and acting as county surveyor. John G.'s marriage to Dolly Madison's sister Mary Payne ensured permanent connections to Virginia aristocracy.<sup>61</sup>

Edward's son Jonathan attended the Randolph Academy in Clarksburg, read law under his uncle John G.<sup>62</sup> and, at the age of 20, was admitted to the Harrison County bar in 1810.<sup>63</sup> He briefly held the job of Federal Collector of Internal Revenue for the Western Virginia

district. During the War of 1812 Jonathon formed and was elected lieutenant of a troop of cavalry although they saw no service. After the war he was a charter officer of the Masonic Lodge in Clarksburg. He had earlier met Julia Beckwith Neale while attending the Male Academy in Parkersburg and they were married on September 28, 1817. Julia had deep roots in Virginia--her ancestor Thomas Neale was commissioned Royal Patent Postmaster of all the colonies in 1692.<sup>64</sup> Like her new husband, Julia was uncommonly well educated. Jonathon promptly built her a three room brick cottage in Clarksburg and their first child, Elizabeth, was born in 1819. Their second child, Warren, was born to them in January, 1821. Thomas Jackson came into the world on the 21st of January, 1824. He was named after his grandfather Thomas Neale and would later add his middle name Jonathon in honor of his father.

#### Early Life

Thomas' family soon fell upon hard times while he was still a toddler. Fever (probably typhoid) struck the Jacksons in 1826. Seven year old Elizabeth became ill and in less than a month both her and her father Jonathon were dead. The day after Jonathon died Julia gave birth to Laura Ann Jackson.<sup>65</sup> Although Jonathon had a good income, he also left many debts and the family was left without money or assets. They moved into a small cottage with the help of the local Masons and Julia took in sewing and taught school, despite offers of relatives to provide financial help. Four years later she married a lawyer, Captain Blake Woodson, and moved with him to the small settlement of Ansted. Her health deteriorated and the new couple did not have the means to care

for the children so the decision was made to have them stay with relatives for the time being. Thomas, now six years old, ran and hid in the woods when an uncle came to get him. After two days of persuasion, Thomas finally relented and, accompanied by Laura (Warren had gone to live with their uncle Alfred in Parkersburg) they set off for Jackson's Mill near Weston, Virginia.<sup>66</sup> Only two months later the children were summoned back to their mother. Julia had just given birth to a son (Wirt Blakemore) and was dying. Thomas' last memories of his mother were of her fervent prayers for her children. After being passed around to various relatives and acquaintances they finally wound up at Jackson's Mill in 1831.<sup>67</sup>

Jackson's Mill became a happy place for the two young Jackson's. Grandmother Jackson watched over the household of her three sons and two daughters, all unmarried. Uncle Cummins became Thomas' surrogate father and frequently used the young boy as a jockey for his race horses. At the age of twelve Thomas had gone to stay with his uncle Brake and aunt Polly in Harrison County. Here he had a falling out with his uncle and promptly left. When he showed up at the house of a relative and was asked about the situation, he replied simply, "Uncle Brake and I don't agree; I have quit him, and shall not go back anymore."<sup>68</sup> About this time Thomas developed a keen interest in learning and began to read voraciously. It was also evident that he had some sort of a stomach problem that adversely effected his appetite. During his teenage years his older brother Warren came and convinced him that they should raft down the Mississippi and make a fortune cutting wood for steamboats. They left in the fall of 1836 and returned in February with no money and



in poor health. Neither boy would talk of the trip and three years later Warren died of the ague he had contracted on the journey at the age of nineteen.<sup>69</sup> In the summer of 1837 Thomas (now thirteen years old) got a job as engineering assistant with a company building a local turnpike. He was so intrigued with the construction problems and tools that he determined to obtain more schooling. His studies went well and by the time he was sixteen he was teaching school himself. Sometime in 1840 he began to develop a serious interest in the Bible and became well versed in his knowledge of scripture. At seventeen he became the district constable--a job which amounted mostly to collecting overdue debts. Local citizens were impressed with his devotion to duty as a sworn official, particularly that an oath was a solemn duty to be performed to the letter.<sup>70</sup> Thomas became aware of a vacancy at West Point about this time and applied for admission. He lost to another young man in the district but when the appointee had spent a few weeks at the Academy he resigned and returned home. Thomas Jackson now was at the top of the list and, as a latecomer, entered West Point with the class of 1846.<sup>71</sup>

#### West Point

Thomas did not adjust quickly to the rigorous academic life of the Academy. He experienced profound homesickness and struggled doggedly with the coursework.<sup>72</sup> Although the practice was forbidden, Thomas typically "would pile up his grate with anthracite coal, and lying prone before it on the floor, would work away at his lessons by the glare of the fire . . . till a late hour of the night".<sup>73</sup> His

tenure at the Academy was consumed by his determination to succeed. He had virtually no social life and later remarked, "I do not remember having spoken to a lady while I was at West Point".<sup>74</sup> During this time he compiled a list of maxims to be used as personal guidelines in life. These included:

Sacrifice your life rather than your word. . . . Disregard public opinion when it interferes with your duty. . . . Through life let your principle object be the discharge of duty. . . . Resolve to perform what you ought; perform without fail what you resolve.<sup>75</sup>

Thomas was not well understood by his classmates and seemed to have no qualms of the unusual practice of befriending those in other classes. His friends included U. S. Grant, William Rosecrans, James Longstreet, and A. P. Hill. He did have one enemy however, another frontier raised orphan by the name of Tomkins. In one incident, Tomkins switched a dirty musket for Thomas' clean one prior to an inspection and when confronted denied any knowledge of the matter. Thomas pressed charges on the moral grounds that Tomkins lied and, despite much opposition, insisted on a court martial. Only after it became evident that most of the cadets and faculty opposed the action did Thomas relent and drop the charge.<sup>76</sup> On the compassionate side, Thomas was known for his concern for the well being of his fellows, especially sick ones, and nursed them with what was described as "a womanly zeal".<sup>77</sup> Even so, the main accomplishment of Thomas Jackson as a cadet was his victory over the academic program and the development of his thought processes. A roommate later penned:

No one I have ever known could so perfectly withdraw his mind from surrounding objects or influences, and so thoroughly involve his whole being in the subject under consideration.<sup>78</sup>

He rose steadily in class rank, from near the bottom of the class his first year to seventeenth out of sixty, with his top ranking of fifth being in his favorite course--ethics. In 1846 the war with Mexico had been in progress over a month when Thomas Jonathan Jackson received his long sought after commission as a brevet second lieutenant in the artillery.

#### Service Years

Thomas was assigned to company K, First Artillery, stationed on Governor's Island, New York. As soon as he arrived the company was alerted for deployment to Mexico. With his commander, Captain Francis Taylor, Thomas departed (along with thirty men and forty horses) on a thirty-six day journey to Point Isabel, Texas, and arrived just in time to hear that General Taylor had captured Monterrey. There was to be a lull in the war however, and at Point Isabel he acted as an assistant commissary for the remainder of 1846.<sup>79</sup> In March the fighting resumed and Thomas got his first taste of battle at the siege of Vera Cruz and later he was involved in the pursuit of the retreating Mexicans at Cerro Gordo. Once in the city of Jalapa, Thomas had time to reflect upon his surroundings. He started to learn Spanish (with the idea of meeting some of the local young women) and his letters to his sister began to carry spiritual undertones coupled with ardent ambition. Expressing his restlessness with garrison duty in Jalapa while the rest of the army advanced he wrote:

I throw myself into the hands of an all wise God and hope that it may yet be for the better. It may have been one of His means of diminishing my excessive ambition; and after having accomplished His

purpose, whatever it may be, He then in His infinite wisdom may gratify my desire.<sup>80</sup>

Thomas requested and received assignment to a front line battery and soon was back in the fighting. As he and a small escort were proceeding to the front they were attacked by a band of guerrillas. In a letter he wrote that he and his band "succeeded in killing four of the enemy and taking three prisoners, together with a beautiful sabre."<sup>81</sup> Thomas wrote calmly even though they had been outnumbered in the hand-to-hand fight, but the real show of mettle was yet to come. At the final battle of Chapultepec, Thomas pushed his gun forward of the infantry and commenced a duel with the Mexican batteries. This drew the concentrated fire of the entire Mexican line and soon only Thomas and a sergeant were left to serve the gun. He received an order to retire with the gun and he promptly disobeyed arguing that with fifty more men he could hold the position. A second brigade was brought up, charged and carried the breastworks. As the retreating Mexican fled down the streets and alleys of Mexico city, Thomas and his commander followed and poured fire into the routed columns, even though they were far in advance of the rest of the army. For his actions here at the final assault on Mexico City Thomas was breveted to the rank of Major. He spent the months following the war taking in the finer points of Mexico City. He learned to dance, polished his Spanish, and kept an eye out for eligible young Mexican women. He wrote his sister,

I think that probably I shall spend many years her and may possibly conclude (though I have not yet) to make my life more natural by sharing it with some amiable Senorita.<sup>82</sup>

Thomas did not marry in Mexico, but he did begin an earnest inquiry into the Catholic faith. He had made the acquaintances of several priest and

conduct unbecoming an officer. French denied the accusations and placed Thomas under arrest for the same offense. Another officer on post approached Thomas and attempted to persuade him to drop the charges on account of the hurt that would come to Mrs. French if the whole issue became public. The argument was well presented but Thomas, with tears running down his face, insisted that conscience compelled him to prosecute the case.<sup>86</sup> All during this time Thomas was writing to his sister about the duties of a Christian, especially concerning hypocrisy and the upholding of morals. The generals in the chain of command could not come to an adequate solution of the problem which eventually wound up on the desk of the secretary of war. Eventually Thomas was ordered released and French transferred to another post. Even though Thomas had recently written his sister that he foresaw a long career in the army, the incident must have helped to change his mind. Several months before he had received a letter from the Virginia Military Institute asking if he would be interested in the position of Professor of Natural and Experimental Philosophy. At the age of twenty-seven, Thomas Jackson resigned his commission and embarked on a career in the teaching profession.<sup>87</sup>

Life at VMI was relatively calm after active service. Thomas was not noted for his expertise as an instructor and he actually built a solid reputation for being a terrible teacher. His eyes bothered him as did his stomach and he went to great lengths to overcome his physical infirmities. He developed a rigid schedule of eating and memorizing his lessons that on the surface appeared eccentric. He studied the next days lessons when the daylight allowed for proper reading and at night

would sit staring at a wall mentally reviewing before the next mornings recitation. Thomas' unswerving discipline also gained attention. In one incident, a cadet involved in making "a noise" in class was court-martialed and dismissed.<sup>88</sup> His devotion to his faith grew during this time and he caused a stir in the community by starting a Black Sunday school. He wrote his aunt,

Within the last few days I have felt an unusual religious joy. I do rejoice to walk in the love of God. . . . My Heavenly Father has condescended to use me as an instrument for setting up a large Sabbath-school for the Negroes here.<sup>89</sup>

Thomas developed close friendships with Major D. H. Hill and a local bookstore owner, John B. Lyle. Both were ardent Presbyterians and through their encouragement's, Thomas joined the church on November 22, 1851.<sup>90</sup>

During his tenure at the University, Thomas finally gave up his bachelorhood. D. H. Hill welcomed Thomas into his office one day thinking that there was some academic matter at hand, but was pressed with advice of quite a different matter concerning the college presidents' daughter, Ellie Junkin. "I don't know what has changed me," Thomas said, "I used to think her plain, but her face now seems to me all sweetness."<sup>91</sup> When Hill laughingly replied that he must be in love, Thomas agreed that this might be possible. A romance blossomed between the two, but, to Thomas' dismay, quickly soured. He attempted to divert his attention to his sister (who had backslidden from the faith) through numerous letters extolling her to the truth of the Scriptures. In a few months the situation changed and, on August 4, 1853 in a secret ceremony, Thomas and Ellie were married.<sup>92</sup>

Although happy, the marriage was soon to end. In October of the following year, both Ellie and their child died during birth. Thomas was severely shaken as he later confided to her sister Maggie:

I am looking forward with pleasure to that time when I shall only be seen by those who love me, as I now see Dear Ellie. Ah, if it only might please God to let me go now!<sup>93</sup>

For over a year Thomas grieved his loss and busied himself with work and other ventures.<sup>94</sup>

### The Decision

As Thomas recovered from the loss of his wife he began to hint of his feelings on the growing tensions between North and South. He wrote to Laura concerning the ideas of a relative:

Say to him that I design following out his idea of locating some land in a Northern state, but that I am a little afraid to put much there for fear that in the event of a dissolution of the Union that the property of Southerners may be confiscated.<sup>95</sup>

In a similar letter concerning his half-brother Wirt in 1855 who wanted to relocate into free territory he added, "He [Wirt] would probably become an abolitionist; and then in the event of trouble between North and South he would stand on one side, and we on the opposite."<sup>96</sup> About this time Thomas took a summer trip to Europe and, upon returning in the fall of 1856, decided that his mourning should end in another marriage.

Thomas had much earlier made the acquaintance of Mary Anna Morrison--the younger sister of D. H. Hill's wife. He decided that he should marry her and began courting in earnest through the mail. They were married the following summer on July 17, 1857 at her home in Cottage Home, North Carolina. Coincidentally Anna, like Ellie before her, was the daughter of a Presbyterian minister.<sup>97</sup> Thomas and Anna

moved into a large old house in Lexington in the winter of 1858. There Mary Graham Jackson was born in February but she became jaundiced and died in May. Again, Thomas had to endure the tragic loss of a loved one--especially hard since he had a particular affection for children. In the fall his nephew Thomas Arnold (twelve years old) came to spend the winter and helped to relieve the grieving couple. In November, 1859, he was ordered to command a detachment of troops at the public hanging of the abolitionist John Brown. The scene ominously portrayed a country on the verge of destruction. During the summer of 1860, Thomas and Anna traveled north to take the baths (for health reasons) and Thomas made the friend of an ardent Abolitionist Baptist minister. He listened to his arguments concerning slavery and secession but did not himself enter into them. The following winter he wrote Laura,

I am looking forward with great interest to the 4th of January when the Christian people of this land will lift their united prayer as incense to the Throne of God in supplication for our unhappy country. (A national day of prayer for peace). What is the feeling about Beverly respecting secession? I am strong for the Union at present, and if things become no worse I hope to continue so. I think the majority in this country are for the Union, but in counties bordering on us there is a strong secession feeling.<sup>98</sup>

He wrote more of his feelings to young Thomas Arnold:

I am in favor of making a thorough trial for peace, and if we fail in this, and the state is invaded, to defend it with a terrific resistance . . . if the free states, instead of permitting us to enjoy the rights guaranteed to us by the Constitution . . . should endeavor to subjugate us, and thus excite our slaves to servile insurrection in which our families would be murdered without quarter or mercy, it becomes us to wage such a war as will bring hostilities to a speedy close.<sup>99</sup>

In April secession feelings grew rapidly in Lexington. A clash broke out between some VMI cadets and local citizens. The cadets were calmed



somewhat by officers of the college and Thomas was called on to speak to the agitated cadets. He spoke:

Military men make short speeches, and as for myself I am no hand at speaking, anyhow. The time for war has not yet come, but it will come, and that soon; and when it does come, my advice is to draw the sword and throw away the scabbard.<sup>100</sup>

When Virginia seceded, Thomas' longtime friend and former father-in-law Dr. George Junkin, resigned his presidency of Washington College and moved north. But events were moving rapidly and Colonel Smith of VMI offered the services of the cadets to Governor John Letcher. The order came from Richmond that the cadets were to proceed there on the 21st of April. After a hurried breakfast and fervent prayers with Anna, Thomas Jonathon Jackson led the column of cadets out of Lexington for Virginia and the Confederacy.<sup>101</sup>

### Robert Edward Lee

#### Ancestry

The Lees of Virginia originated in the Schropshire area of England where the knight Reyner de Lea (meaning of the meadow and later spelled *Lee*) settled about a century after the Norman Conquest. He himself was a descendant of one of warriors at the battle of Hastings in 1066. One of his descendants, Roger Lee, married Margaret Astley in 1385 thereby combining the two family crests on the present day Lee coat of arms. The Lee family motto was established as *Non Incautus Futuri* which translated is Not Unmindful of the Future. The Lees established a large estate known as Coton Hall and from here, Colonel Richard Lee emigrated to the American settlement at Jamestown around the year 1640. Richard rapidly gained affluence in the new world. He married and began

his family, survived the Indian massacre of 1644, and was appointed Secretary of State of Virginia in 1649. By the time of his death in 1664, Richard had become one of the wealthiest men in Virginia. He left over four thousand acres of tidewater property and eighty slaves to his surviving wife and eight children. The next six generations of Lees would produce a preponderance of public servants. Of the fifty-four adult males, thirty seven would hold office to include fifteen military officers, thirty-nine government seats and two signers of the Declaration of Independence. One of these, Richard's great-grandson Henry (the future father of Robert), was born at Leesylvania south of Alexandria in 1756.<sup>102</sup>

Henry graduated with honors from Princeton in 1773 (age seventeen) and would have gone to England to study law, but with the hint of war in the future he remained and was commissioned a captain of cavalry at the age of twenty-one. He enjoyed spectacular successes during the Revolutionary War, particularly in the south under General Nathanael Greene, earning the nickname "Light Horse Harry". However, when the war ended Henry grew resentful and dissatisfied, apparently unhappy with his lack of high rank. In 1781 he married his second-cousin Matilda Lee and seemed assured of an easy life on her great estate of Stratford on the Potomac river.<sup>103</sup> Henry entered politics and was elected as a delegate to Congress in 1785. Matilda was not well, however, and they spent much time at various spas and baths in search of health. Henry lost his bid for re-election to the delegation to James Madison and promptly accused his constituents of ingratitude. However, when the Constitution was presented for ratification Henry was

one of its most ardent supporters in Virginia. Long a personal friend of George Washington, Henry wrote him in 1790 that Matilda was in such poor health that he feared for her life. She died a few months later at the age of twenty-six while giving birth to their fifth child. Henry's grief was profound and he never fully recovered from Matilda's death. In 1791 he was elected Chief Magistrate of the Commonwealth of Virginia and moved with his three surviving children to the governor's house near the capitol. Here he began a long series of ill-fated financial speculations and sank deeply into debt. Apparently Henry had displayed such irresponsibility before as Matilda had put her estate into a deed of trust for her children before she died and his father named a younger brother executor of the father's will.<sup>104</sup> He dabbled with the idea of returning to military life and even wrote to Lafayette to inquire of possibilities with the French Army. About this time tragedy struck again when his seven-year-old son Philip died suddenly. Henry's grief over these events gradually subsided and he began looking for a new wife. He confided to Alexander Hamilton that he was "in love with every sweet nymph"<sup>105</sup> and in 1793 met Miss Maria Farley. Although Henry was greatly enamored with Maria, she rejected his amorous advances. However, her best friend Ann Carter secretly became so enraptured with Henry (who was seventeen years older than her) that she became ill. Since Maria would not have him, Henry turned to Ann as the best available substitute. Her parents saw through this shallow ploy but to no avail. Ann already had the reputation of being gentle, but tenacious and strong-willed. She knew her mind and on June 18, 1793, wearing a

locket given her by George Washington, Ann Hill Carter married Henry "Light-Horse Harry" Lee.<sup>106</sup>

Ann's family had a history in Virginia to rival that of the Lee's. John Carter arrived from England in 1649, acquired a large estate, and served in the House of Burgesses. His son Robert became the richest man in Virginia, owning over three hundred thousand acres of land and a thousand slaves. His wealth was so great that he became known as 'King' Carter amongst his associates. 'King' Carter also served in the House of Burgesses, as acting Governor of the Colony, and on the King's Council for Virginia. Carter's descendants included three governors of Virginia, three signers of the Declaration of Independence, and two Presidents of the United States. Ann was the great-granddaughter of 'King' Carter and heir to a considerable portion of his estate. Henry doubtless knew this and perhaps saw an answer to his financial woes.<sup>107</sup>

Although Ann may have hoped that she could win Henry's true affection, the reality of the situation soon became evident. What wealth she had was soon spent on previous debts, she was largely left alone, and Henry built a reputation of paying too much attention to other women. However, Ann persevered. She spent much time with her family as Henry continued his pursuit of wealth and political influence. Her first child, Algernon, was born in 1795. She got along well with her eight-year-old step-son Henry but step-daughter Lucy hated and reviled her. Algernon died a year later and Ann was generally alone with her sorrow. Charles Lee was born in 1798 at a time when Henry was again deep in debt. In 1799 George Washington died and Congress asked

Henry to deliver the funeral oration in which he coined the phrase, "First in war, first in peace, and first in the hearts of his countrymen."<sup>108</sup> The next several years were spent in having more children and a steady decline of wealth. Ann suffered through such periods of depression and invalidism that during her fifth pregnancy she admitted to not wanting another child. She was faced with added pain when she went to visit her father and learned upon arriving that he had suddenly died. Fortunately her inheritance was protected, "free from the claim, demand, let, hindrance, or molestation of her husband, General Henry Lee or his creditors directly or indirectly."<sup>109</sup> Her favorite sister was also terribly ill and it was with gloomy spirits that Ann returned to her home in the icy winter of 1806-7. Into this world of despair Robert Edward Lee was born on January 19, 1807.

#### Early Life

When Robert was still two years old Henry was arrested and jailed in debtor's prison. Upon his release he decided that he would no longer live with Ann. During her plans to move back among relatives, Henry changed his mind but Ann would only take him back if she chose the place of residence. She picked Alexandria and the family moved there the following year. Here they lived primarily off of Ann's trust fund while Henry wrote his memoirs. Henry was opposed to the prospect of war with England and, with seven others, was severely beaten by a drunken mob in 1812. Now maimed and disfigured, life with Henry challenged the Lee family with "his exhibitions of commingled rage and anguish often terrible."<sup>110</sup> In this broken down state he applied for passage out of

the country and in 1813 sailed for Barbadoes--it was the last time six-year-old Robert was to ever see his father.

Life in Alexandria was austere but good for a growing boy. The legacy of George Washington pervaded everything. Ann (who now refereed to herself as Widow Lee) frequently took her family to visit Mrs. Washington's granddaughter, Eleanor Custis. A local servant known as "Mammy" had been attendant to Martha Washington and told the children of Alexandria many exciting tales. Even the Lee house contained various Washington mementoes. In this environment Robert grew and first attended the Carter family school for boys in Fauquier County.<sup>111</sup> After two years there he enrolled in the Alexandria Academy. When Robert was eleven his father died in Georgia while on his way back to Virginia from the Caribbean. He was not mourned by the family and Henry "Light Horse Harry" Lee was buried in an unmarked grave with none of his family attending the funeral. However, Robert inherited his father's sense of frivolity. He was well liked and perhaps kept responsible by his mother's stern sense of discipline. When his older brother Carter squandered the thousand dollars that Ann had gotten for his education in only a single year, he received a stinging rebuke:

To you, I had looked, for the restoration of that happiness, in part, which my widowed lot had deprived me of. I had hoped you would be a highly educated, discreet, judicious man. That you would have been an example for your Brothers imitation--a dignified protector for your Sisters, and the pride, & solace of your Mother's declining years. But you are not pursuing the Course to fulfill such expectations. He who prefers the gratification of sensual pleasures, to the cultivation of mental endowments, will never be qualified for the performance of such duties.<sup>112</sup>

Robert became a devoted son to his mother and in her infirmities took over many household duties, such as marketing and attending to business

matters. He especially loved horses and riding along with other outdoor sports such as swimming, hunting, and exploring the woods. As he finished his studies in 1823 the natural question loomed as to what to do with his life. Carter had finished school and become a lawyer. His favorite brother Smith had gotten a commission as midshipman and gone off to the Navy. Recently, the Marquis de Lafayette had visited Alexandria. Upon learning that the widow of his old friend lived there he insisted upon a visit and seventeen-year-old Robert came to know some of his father's more admirable legacy.<sup>113</sup> It was decided that Robert should try for an appointment to West Point. His many letters of recommendation, his ancestral links to virtually every affluent family in Virginia, and the gratitude of many who remembered his father's contributions to the nation virtually guaranteed his quest. Robert received confirmation of his appointment on March 11, 1824, but had to wait until July of next year for a vacancy. Parting with his mother and sisters was hard, and, as he left his mother uttered to Sally Lee, "You know what I have lost. He is son, daughter, and everything to me!"<sup>114</sup>

#### West Point

Robert reported to West Point and began the familiar routine of cadet life along with eighty-seven other young men. He easily passed the dreaded entrance exams and in September of 1825 formally began his education as a member of the class of 1829. Robert made friends easily, but he became most attached to Jack Mackay of Georgia and Joe Johnston whose father had fought alongside his own in the Carolinas.<sup>115</sup> During this time the dynamic Reverend Charles McIlvaine was in residence as

chaplain and professor of geography, history, and ethics. Robert spent much time listening to sermons so forceful and convincing that an upperclassman, Leonidas Polk, decided to enter the ministry after graduation. Robert established his high rank in the class during the first winter exams where his ranking of third in mathematics and conduct would have been first were it not for the alphabetical placement of his name. He continued to do well and was even appointed an assistant professor of mathematics (actually a kind of tutor) during his second year. He read numerous books not required by the academic program to include his father's *Memoirs*, *The Federalist*, and Rousseau's *Confessions*.<sup>116</sup> His one furlough home was marked by his mother's declining health and a seemingly continuous celebration. Both Carter and Smith had managed to come home and the midshipman and cadet excited much interest among the eligible ladies of the Virginia aristocracy. One of them, cousin Mary Custis, confided to her friends that she was secretly in love with young Robert.<sup>117</sup> The furlough ended and the cadets were soon back at the task of becoming officers. The next two years passed relatively uneventfully for Robert although he discovered he had a definite ability at engineering. When graduation day came, Robert and four other classmates had not had a single demerit during their four years at the Academy. Robert finished second in a class of forty-six and was commissioned into the Engineer Corps. He had earned his two months graduation furlough and managed to save \$103.58.



## Service Years

The new Brevet Second Lieutenant received two months furlough but it was not to be a happy time for Robert. His mother's health continued to decline and she died on July 26, 1829 at the age of fifty-six.<sup>118</sup> He remained until October settling his mother's estate and then departed for Savannah, Georgia to work on coastal fortifications. He took the elderly servant Nat with him in hopes that the climate would help his aged condition but he soon died in spite of Robert's care. He soon began spending much time with another officers younger sisters when he wasn't playing chess or working in the Georgia swamps. The Lee family name suffered much during this time when it became public knowledge that Robert's half-brother Henry had gotten his wife's teenage sister pregnant some thirteen year prior. President Andrew Jackson had recommended Henry as Consul to the Barbary States and, when the incident surfaced, the Senate disapproved so forcefully that the topic was in all the papers. In May of 1831 Robert asked for and received a transfer to Fort Monroe, Virginia. There he began to frequent the home of Mary Custis. She was a childhood playmate and heiress to several wealthy plantations. Mary shared Robert's love of horses and reading. However, she was quite spoiled and temperamental. Unlike Robert she was notoriously late to functions and careless of her personal appearance. Nevertheless, they were married on June 30, 1831.<sup>119</sup>

The marriage initially proved somewhat difficult for the two. She did not understand Robert's frugality and his insistence that she be allowed only two servants to attend to her needs. She found Army life dreary as she wrote her mother. "Except that we generally get some nice

cake and fruit, they [social functions] would be rather stupid. I suppose it is my fault, but there are not many persons here very interesting."<sup>120</sup> At Christmas they visited her parents and Mary decided that she wished to stay for awhile, so Robert returned to Fort Monroe alone. Mary spent most of her time at Arlington, seemingly preferring the company of her mother to that of her husband. George Washington Custis Lee was born on September 16, 1832. Robert at times maligned their absences and at others seemed quite happy to have them gone. He wrote one friend, "Mrs. Custis and Mary have gone to Shirley, which is as much to say that I am as happy as a clam at high water."<sup>121</sup> Robert enjoyed socializing (especially with women) and Mary did not. He apparently attempted to get Mary to spend more time with him as he wrote of his female friends:

Let me tell you Mrs. Lee, no later than today did I escort Miss G. to see Miss Slate! Think of that Mrs. Lee! And hasten down if you do not wish to see me turned out a Beau again. How I did strut along. . . . And my whole face thrown into the biggest grin I could muster<sup>122</sup>

When many of the post officers had been sent to Florida he wrote, "I am left to console them, & am in the right position to sympathize with them as Mrs. Lee & her little Limb are at Arlington."<sup>123</sup> In late 1834 Robert was transferred to an office in Washington and the family resided at Arlington. Robert initially tried to get a house in the city but eventually gave up and rode across the Potomac each day or stayed in a boarding house during inclement weather. Robert continued his social life apart from Mary as evidenced by the letter to a friend:

My spirits were so buoyant when relieved from the eyes of my Dame, that my Sister Nanie was trying to pass me off as her spouse but I was not going to have my sport spoiled in that way & undeceived the

young ladies & told them I was her younger brother. Sweet innocent young things, they concluded I was single, & I have not had such soft looks & tender pressures of the hand for many years.<sup>124</sup>

In the spring of 1835 Robert was detailed to accompany a survey party to the Ohio-Michigan border and did not return until October. His wife had gone to Ravenworth and their daughter Mary Custis was born during his absence. Although the birth was normal, Mary became ill and was bedridden for several months. Upon her entreaty to come to her side Robert replied,

But why do you urge my immediate return, & tempt one in that strongest manner, to endeavor to get excused from the performance of a duty, imposed on me by my Profession, for the pure gratification of my private feelings? . . . I cannot in conscience do what you ask. . . . I must not consent to do aught that would lower me in your eyes, my own & that of others. . . . You see therefore Molly that every consideration induces you to cheer up . . . to lay aside unavailing regrets; to meet with a smiling face & cheerful heart the vicissitudes of life<sup>125</sup>

When Mary had recovered somewhat they spent some time in western Virginia taking in the mineral waters in an attempt to improve her health. The journey had some unrecorded impact on Robert's life as one of his relatives wrote, "I never saw a man so changed and saddened."<sup>126</sup> He was unhappy with life in the Washington office and constantly pondered a change to civilian life. Robert requested reassignment to the Mississippi area to work on engineering canals and received approval in April of 1837. A month later their third child, William Henry Fitzhugh, was born and Robert left for St. Louis in June. For the next nine years Robert would spend his time on various engineering projects. He was almost always homesick, especially for his children. Four more were born, Annie Carter in June of 1839 while Robert was away in St. Louis, Agnes in the winter of 1840-41, Robert Jr. in October of 1843

while Robert was gone to Fort Hamilton, and Mildred in March of 1846 with Robert again away at Fort Hamilton. On some occasions Mary and the family attempted to accompany Robert to his new posts but invariably wound up returning to Alexandria to leave Robert a geographic bachelor. Robert appeared to be active in the Episcopal church of which he was vestryman for a local congregation. He was inclined to seek out and find the company of ladies wherever he went and wrote a friend, "you are right in my interest in pretty women, & it is strange that I do not lose it with age. But I perceive no diminution."<sup>127</sup> His wife later wrote of him, "No one enjoyed the society of the ladies more than himself. It seemed the greatest recreation in his toilsome life."<sup>128</sup> The routine came to a close in 1846, however, when the United States declared war on Mexico. Before Robert left for Mexico he carefully prepared his will which left his estimated \$38,750 estate to Mary "in full confidence that she will use it to the best advantage in the education and care of my children."<sup>129</sup>

Robert arrived in San Antonio in September, 1846 and was assigned as engineer for General Wool. His first action was the assault on Vera Cruz where he fought alongside his brother Smith during the siege. He wrote of the scene,

I . . . am at a loss what I should have done had he been cut down before me. I thank God that he was saved. The shells thrown from our battery were constant and regular discharges. . . . It was awful! My heart bled for the inhabitants. The soldiers I did not care so much for, but it was terrible to think of the women and children.<sup>130</sup>

Robert made his most meritorious contributions during the campaign for Mexico City performing engineering reconnaissance. In one particular

instance he was scouting forward and was surprised by a group of Mexican soldiers. He hid behind a log which some of the enemy soldiers chose to set on for several hours. Despite ravenous insects, Robert managed to remain undetected and reported safely back to his commander. General Scott spoke of Robert as "indefatigable, in reconnaissance as daring as laborious, of the utmost value."<sup>131</sup> Robert continued the rest of the war on the general staff and received brevets for "gallantry and meritorious conduct" to the ranks of major, lieutenant-colonel, and colonel. After spending some time in Mexico City making maps he departed for home and arrived in Alexandria on June 29, 1848 after an absence of almost two years.<sup>132</sup>

The years immediately following the war were relatively calm for the Lee's. Robert was put back to work building fortifications and was stationed in Baltimore. Here he rented a house and moved his family to the city. About this time he received an offer to lead exiled Cuban revolutionaries in a plot to free Cuba from Spain. Jefferson Davis had earlier refused the \$200,000 offer and Robert also refused, feeling that to engage on such an enterprise would not be consistent with his duty as an officer of the United States government.<sup>133</sup> The revolutionaries were later caught and executed. In 1850 Robert's oldest son Custis entered the Military Academy. Two years later Robert was appointed as the Academy's Superintendent--an assignment from which he requested excusal on the grounds that he was not up to the task. The request was denied so Robert and the family took up residence at West Point in September of 1852.<sup>134</sup>

The next two years at the Military Academy were good, family oriented times for the Lees. Although Robert tended to worry about each cadet, he ably ran the institution and became known as one of it's best superintendents. This is somewhat remarkable since his son (who graduated first in his class) and nephew (whom Robert twice recommended for dismissal for disciplinary infractions) were both cadets at the time. Two notable events took place during their stay at the Academy; the death of Mary's mother and the consequent spiritual renewal of Robert. In April of 1853 Mrs. Custis became ill and died within days. The entire family was shaken as Robert wrote,

I have no language to express what I feel, or words to tell what I suffer. The blow was so sudden & crushing, that I yet shudder at the shock & feel as if I had been arrested in the course of life & had no power to resume my onward march.<sup>135</sup>

This experience must have caused a sense of personal mortality for on July 17, 1853, he and his two daughters Mary and Annie were confirmed in Christ Church of Alexandria. In March of 1853 the Sioux massacred a small party of soldiers near Fort Laramie, Wyoming, prompting Congress to authorize four new regiments to quell the Indians. Robert was named as lieutenant-colonel of the new 2nd Cavalry under Colonel A. S. Johnston. His response was mixed and showed a growing dependence on his renewed faith:

Personal consideration or convenience would not induce me to sever my connection with my Corps, or to separate myself from my family. And the thought that my presence may be of some importance to the latter, or necessary to my children is bitter in the extreme. . . My trust is in the mercy & wisdom of a kind Providence who ordereth all things for our own good. . . my happiness can never be advanced by separation from my wife, children, & friends<sup>136</sup>

After taking the family back to Arlington, Robert, now forty-eight years of age, departed for St. Louis on April 18, 1855.

During the next few Robert spent his time alternately with the 2nd Cavalry and serving on courts-martial. He kept up with the growing political turmoil over slavery as he penned to Mary,

in this enlightened age, there are few I believe but what will acknowledge that slavery as an institution is a moral and political evil in any country. . . .The blacks are immeasurably better off here than in Africa, morally, socially, and physically. . . . How long their subjugation may be necessary is known and ordered by a wise Merciful Providence. Their emancipation will sooner result from the mild and melting influence of Christianity than the storms and tempests of fiery controversy. This influence though slow is sure. The doctrines and miracles of our Savior have required nearly two thousand years to convert but a small part of the human race, and even among Christian nations what gross errors still exist! While we see the course of the final abolition of human slavery is onward, and we give it the aid of our prayers and all justifiable means in our power, we must leave the progress as well as the result in his hands who sees the end.<sup>137</sup>

Although able to return to Arlington on occasion, Robert was unable to convince Mary to accompany him to the Texas frontier. She suffered from various maladies as she became older and seemed to want to stay by her father's side. In late 1857, the aging Mr. Custis died. Robert made application for an extended leave and soon was on his way back to Alexandria. He wrote to A. S. Johnston as he departed, "I can see that I have at last to decide the question I have staved off for twenty years, whether I am to continue in the army all my life, or to leave it now."<sup>138</sup>

Robert spent the next two years on extended furlough trying to settle all the matters of his father-in-law's estate. On a Sunday morning in October of 1859 he received a message delivered by a former cadet, Lieutenant J. E. B. Stuart, from the War Department. There was a

slave uprising at Harpers Ferry and Robert's services were urgently needed. He went and commanded the storming of the arsenal in which the insurrectionists were holed up and took the infamous John Brown into custody. The nation became inflamed at the depth of the plot to stage a slave revolt and the trial set the stage for the conflagration to come. Robert commanded the troops at John Brown's execution but his reaction to the ordeal is unknown. However, he soon had other matters to attend to as he was ordered back to Texas where he arrived in San Antonio on February 19, 1860.

#### The Decision

Since Robert was the ranking officer he took command of the Department of Texas. His first grandson was born in the spring of 1850 as Robert Edward Lee III. For the remainder of the year Robert concerned himself with his lonely duties pursuing the Mexican outlaw Juan Cortinas and watching the nation sink further into a political abyss. In December, the day after he had been replaced by General David Twiggs, he wrote Custis,

I am not pleased with the course of the "Cotton States," as they term themselves. In addition to their selfish, dictatorial bearing, the threats they throw out against the "Border States," as they call them, if they will not join them, argues little for the benefit or peace of Va. should she determine to coalesce with them. While I wish to do what is right, I am unwilling to do what is wrong, either at the bidding of the South or the North. One of their plans seems to be the renewal of the slave trade. That I am opposed to on every ground.<sup>139</sup>

A few days later Robert left to take command of Fort Mason, a post located to the northwest of San Antonio. On February 1, 1861, Texas



became the seventh state to pass an ordinance of secession. Robert penned:

As an American citizen, I take great pride in my country, her prosperity and institutions, and would defend any state if her rights were invaded. But I can anticipate no greater calamity for the country than a dissolution of the Union. It would be an accumulation of all the evils we complain of, and I am willing to sacrifice everything but honor for its preservation. . . . Secession is nothing but revolution. . . . If the Union is dissolved and the Government disrupted, I shall return to my native state and share the miseries of my people, and save in defense will draw my sword on none.<sup>140</sup>

Robert received orders to report to Washington and left Fort Mason on February 13. An army officer who saw him as he passed through San Antonio later wrote, "I have seldom seen a more distressed man. He said, 'When I get to Virginia I think the world will have one soldier less. I shall resign and go to planting corn.'"<sup>141</sup> Robert arrived back in Arlington on March 1 and went to see General Winfield Scott a few days after Lincoln's inauguration. Little is known of the conversation, but Lee was promoted to colonel of the First Cavalry--a commission which was signed by Lincoln March 16 and accepted by Robert on March 28.<sup>142</sup> The bombardment of Fort Sumter began on April 12. Robert received another summons from General Scott and a presidential confidante, Francis Blair, on April 17. On the 18th he went first to see Blair where he was offered command of the Union army. Robert later wrote,

After listening to his remarks, I declined the offer he made me, to take command of the army that was to be brought into the field, stating as candidly as I could, that, though opposed to secession and deprecating war, I could take no part in an invasion of the Southern States.<sup>143</sup>

From this interview he went directly to General Scott's office where an aide later recalled Scott to have said:

Lee, you have made the greatest mistake of your life; but I feared it would be so. There are times when every officer in the United States service should fully determine what course he will pursue and frankly declare it. No one should continue in government employ without being actively employed. If you propose to resign, it is proper that you do so at once; your present attitude is equivocal.<sup>144</sup>

From Scott's office Robert went for a long consultation with his brother Smith, and, upon returning home, first heard from a newsboy of Virginia's secession. The next day he went into Alexandria where the news of secession was confirmed and, when asked by his druggist as to his opinion on the news, Robert replied, "I must say that I am one of those dull creatures that cannot see the good of secession."<sup>145</sup> Robert returned home and asked Mary that he be left alone. He spent the evening in his room and sometime after midnight, came down to show her two letters he had written. The first, to General Scott, contained the following:

General: Since my interview with you on the 18th inst. I have felt that I ought no longer to retain my commission in the Army. I therefore tender my resignation, which I request you will recommend for acceptance. It would have been presented at once but for the struggle it has cost me to separate myself from a service to which I have devoted the best years of my life and all the ability I possessed. . . . Save in the defense of my native state, I never desire again to draw my sword<sup>146</sup>

The other, to Secretary of War Simon Cameron, stated simply, "Sir--I have the honour to tender the resignation of my Commission as Colonel of the 1st Regt of Cavalry."<sup>147</sup> Robert had been a Colonel of Cavalry just twenty-two days and in the United States Army for thirty-two years.

Later that morning he wrote to Smith,

The question . . . has in my own mind been decided. . . . I am liable at any time to be ordered on duty which I could not conscientiously perform. To save me from such a position, and to prevent the necessity of resigning under orders, I had to act at once and before I could see you again on the subject, as I had

wished. I am now a private citizen, and have no other ambition than to remain at home.<sup>148</sup>

In a letter to his sister Ann (married to a pro-Union man with a son in the U. S. Army) Robert stated,

With all my devotion to the Union and the feeling of loyalty and duty of an American citizen, I have not been able to make up my mind to raise my hand against my relatives, my children, my home . . . save in defense of my native State (with the sincere hope that y poor services may never be needed), I hope I may never be called on to draw my sword. I know you will blame me; but you must think as kindly of me as you can and believe that I have endeavored to do what I thought right.<sup>149</sup>

These letters were sent on Saturday, April 20. On the following day after church, officials from Richmond came to offer Robert command of all military forces of Virginia. He spent some time that afternoon consulting with his cousin Cassius concerning the future and then spent what would be his last night ever in the Arlington house. On Monday Robert Edward Lee--sixth generation American--wearing a black suit and silk hat, proceeded to Richmond and accepted a commission as major-general in command of the military forces of Virginia.<sup>150</sup>

## Endnotes

<sup>1</sup>John C. Pemberton, *Pemberton, Defender of Vicksburg* (Durham, NC: The University of North Carolina Press, 1942), 7.

<sup>2</sup>Michael B. Ballard, *Pemberton* (Jackson, MS: University Press of Mississippi, 1991), 4-5.

<sup>3</sup>*Ibid.*, 5-6.

<sup>4</sup>Pemberton, 8.

<sup>5</sup>Ballard, 6-11.

<sup>6</sup>*Ibid.*, 13-15.

<sup>7</sup>*Ibid.*, 16.

<sup>8</sup>*Ibid.*, 23.

<sup>9</sup>*Ibid.*, 22-24.

<sup>10</sup>Pemberton, 10.

<sup>11</sup>Ballard, 27-31.

<sup>12</sup>*Ibid.*, 31-35.

<sup>13</sup>*Ibid.*, 38-39.

<sup>14</sup>*Ibid.*, 39.

<sup>15</sup>*Ibid.*, 50.

<sup>16</sup>Pemberton, 14.

<sup>17</sup>Ballard, 59-62.

<sup>18</sup>*Ibid.*, 65.

<sup>19</sup>*Ibid.*, 69, 76.

<sup>20</sup>*Ibid.*, 75.

<sup>21</sup>*Ibid.*, 73-79.

<sup>22</sup>*Ibid.*, 79-82.

<sup>23</sup>*Ibid.*, 83.

<sup>24</sup>*Ibid.*, 83.

<sup>25</sup>Ibid., 83.

<sup>26</sup>Pemberton, 23-24.

<sup>27</sup>Maurice Klein, *A Life of General Edward Porter Alexander* (Ph.D. Emory University, 1965), 1-4.

<sup>28</sup>Ibid., 4-5.

<sup>29</sup>Ibid., 6.

<sup>30</sup>Ibid., 6.

<sup>31</sup>Gary W. Gallagher, *Fighting for the CONFEDERACY* (Chapel Hill: University of North Carolina Press, 1989), 3.

<sup>32</sup>Klein, 11.

<sup>33</sup>Gallagher, 5.

<sup>34</sup>Ibid., 3.

<sup>35</sup>Ibid., 3-4.

<sup>36</sup>Klein, 11-15.

<sup>37</sup>Ibid., 17.

<sup>38</sup>Ibid., 20.

<sup>39</sup>Ibid., 24.

<sup>40</sup>Ibid., 23.

<sup>41</sup>Gallagher, 8.

<sup>42</sup>Ibid., 28.

<sup>43</sup>Ibid., 29.

<sup>44</sup>Ibid., 33.

<sup>45</sup>E. P. Alexander, *Military Memoirs of a Confederate* (New York: Charles Scribner's Sons, 1907), 1.

<sup>46</sup>Klein, 41.

<sup>47</sup>Ibid., 41.

<sup>48</sup>Ibid., 42.

<sup>49</sup>Ibid., 50.

- <sup>50</sup>Gallagher, 15.
- <sup>51</sup>Ibid., 16-17.
- <sup>52</sup>Klein, 54.
- <sup>53</sup>Ibid., 54-55.
- <sup>54</sup>Gallagher, 21.
- <sup>55</sup>Ibid., 24.
- <sup>56</sup>Alexander, 6-7.
- <sup>57</sup>Gallagher, 27.
- <sup>58</sup>G. F. R. Henderson, *Stonewall Jackson and the American Civil War* (Gloucester, MA: Peter Smith, 1968), 32.
- <sup>59</sup>John Bowers, *Stonewall Jackson* (New York: William Morrow and Co., 1989), 38-39.
- <sup>60</sup>Burke Davis, *They Called Him Stonewall* (New York: Rinehart & Co., 1954), 88.
- <sup>61</sup>Ibid., 88
- <sup>62</sup>Ibid., 89.
- <sup>63</sup>Frank E. Vandiver, *Mighty Stonewall* (New York: McGraw-Hill Co., 1957), 2.
- <sup>64</sup>Bowers, 38.
- <sup>65</sup>Vandiver, 3.
- <sup>66</sup>Bowers, 40-41.
- <sup>67</sup>Vandiver, 5.
- <sup>68</sup>Bowers, 44.
- <sup>69</sup>Vandiver, 9.
- <sup>70</sup>Ibid., 12.
- <sup>71</sup>Ibid., 13.
- <sup>72</sup>Ibid., 14.
- <sup>73</sup>Henderson, 41.

- <sup>74</sup>Davis, 94.
- <sup>75</sup>Ibid., 94, Bowers, 56-57.
- <sup>76</sup>Bowers, 57-58.
- <sup>77</sup>Ibid., 57.
- <sup>78</sup>Vandiver, 16.
- <sup>79</sup>Ibid., 20-21
- <sup>80</sup>Ibid., 30.
- <sup>81</sup>Ibid., 31.
- <sup>82</sup>Davis, 106.
- <sup>83</sup>Henderson, 60.
- <sup>84</sup>Davis, 108-109.
- <sup>85</sup>Ibid., 109.
- <sup>86</sup>Vandiver, 66.
- <sup>87</sup>Ibid., 70-71.
- <sup>88</sup>Ibid., 79.
- <sup>89</sup>Davis, 114-115.
- <sup>90</sup>Vandiver, 87.
- <sup>91</sup>Ibid., 90.
- <sup>92</sup>ibid., 96.
- <sup>93</sup>Ibid., 106.
- <sup>94</sup>Davis, 120.
- <sup>95</sup>Ibid., 120.
- <sup>96</sup>Vandiver, 110.
- <sup>97</sup>Ibid., 115.
- <sup>98</sup>Davis, 132.
- <sup>99</sup>Ibid., 133.

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- 101Ibid., 131-132.
- 102Philip Van Doren Stern, *Robert E. Lee - The Man and the Soldier* (New York: McGraw-Hill Book Co., Inc., 1963), 11-25.
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- 113Smith, 22.
- 114Sanborn, 53.
- 115Freeman, 55.
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- 117Sanborn, 63.
- 118Stern, 43.
- 119Smith, 27-28.
- 120Ibid., 29.
- 121Sanborn, 97.
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- 124Ibid., 105-106.  
125Ibid., 107  
126Stern, 60.  
127Sanborn, 139.  
128Ibid., 139.  
129Sterns, 73.  
130Ibid., 78.  
131Smith, 46.  
132Stern, 85.  
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134Ibid., 90.  
135Sanborn, 226.  
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137Stern, 99.  
138Sanborn, 266.  
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140Ibid., 121.  
141Ibid., 121.  
142Sanborn, 308.  
143Ibid., 311.  
144Ibid., 311.  
145Stern, 126.  
146Ibid., 126-127.  
147Ibid., 126.  
148Ibid., 127.  
149Ibid., 127-128.

150 Sanborn, 316.

## CHAPTER 4

### ANALYSIS

The analysis of the preceding chapters involves four separate and distinct areas: first, the four officers themselves must be subjectively evaluated in the sense of what type of persons they appeared to be at the time of their decisions; second, the operational definition of loyalty needs to be applied to their specific situations; third, why did they decide to fight for the Confederacy; and finally, would any type of professional training or code have made a difference.

#### The Officers at a Glance--1861

##### John Clifford Pemberton

At forty-six years of age John Pemberton had led a reasonably successful life. He was not deprived as a child and was reared in a close, mildly religious family where education was highly valued. His West Point experiences profoundly affected his ethical makeup and such convictions seemed to follow the rest of his life. As a cadet he was probably more concerned with how he related to females than the average cadet of his day, perhaps resulting later in a strong tendency to defer to the desires of his wife. Although aware of his heritage, John did not seem overly concerned with living up to any family traditions. On the other hand he was quite attached to his immediate family and greatly valued the relationship with them. John did not make close friends

easily and probably looked upon his wife and his brother as his two closest confidants. He was decidedly brave in battle and was a good officer by any measurement. He had shown a preference for the southern way of life and, as evidenced by the presence of his wife's servants, held no particular aversion to slavery. Even though John experienced numerous personal losses, there is little evidence that he gave religion or spiritual beliefs more than cursory interest.

#### Edward Porter Alexander

At the time of his decision Edward Alexander was a young, impetuous officer eager for excitement. Edward was a characteristically out-of-doors type person and valued hunting and fishing over all other activities. Even so he was thoroughly educated and exposed to the diverse ideas of his northern born tutors, elderly childhood companions, and enlightened mother. His childhood was happy and completely involved in the typical aristocratic plantation life based upon the necessity of slave labor. His parents were devoted to each other and their Christian faith. Edward, however, rebelled against organized religion at an early age but apparently accepted the faith more completely at West Point. He had romantic notions of warfare undoubtedly rooted in his southern upbringing, West Point education, and lack of actual combat experience. Although a newlywed, he did not seem to realize the effects his actions would have upon his wife. His ethical system was in line with his notions of warfare as his greatest fear was being thought a coward by his southern acquaintances. His outlook on life was characterized by a

sense of immortality common to men in their early twenties and he pursued adventure.

#### Thomas Jonathon Jackson

Thirty-seven year old Thomas Jackson had lived a hard and demanding life up to the time Virginia seceded from the Union. Even though his relatives attempted to make his childhood as pleasant as possible, the life of an orphan was laced with emotionally trying situations. His sister remained his closest relation throughout his life. The admonitions of his mother on her deathbed sank deep into his personality and both parents were revered in their absence. Thomas was not connected to the plantation society of the south but rather grew up as a lower middle class lad who had to work for his successes. He developed a tenacious drive for perfection as a boy and approached life with a tremendous amount of ambition. This trait spurred his interest in learning and, although a slow learner, he virtually educated himself. However, Thomas would always be plagued by an inability to relate to others, whether personally or as a teacher. His rigid ideas of honor began early and were so engrained that they caused him trouble on several occasions during his life. He was an excellent officer when allowed to perform independently but did not fare well when closely supervised. Thomas was thought tremendously brave but in actuality his fatalistic views precluded problems of cowardice. The overriding element in his life was his complete devotion to Christianity. The tenets of his faith determined the principles behind almost all of his

actions and supplied him with the internal strength to endure the tragic losses of loved ones.

#### Robert Edward Lee

Robert Lee was fifty-four years old when the first shot was fired at Fort Sumter. He was in a semi-civilian status and in no great hurry to return to active duty. His life had been full, productive, and could be considered successful from almost any point of view. His childhood had not been so ideal. His father left at a critical time in a young boy's life and left a legacy of great service to his country coupled with personal failure. He was raised primarily under the influence of his mother who, although loving, extracted dedication from her children in no uncertain terms. He received the best education available and was obviously keenly intelligent. Robert was surrounded by strong icons of his own and the nation's heritage. His ethical outlook was probably heavily influenced by the examples of the young nation's heroes in addition to the sense of the family tradition of public service. Unlike his father, the austere financial situation of the Lee family taught Robert at an early age to be quite frugal. He did, however, inherit his father's affinity for women. Robert's marriage appears to have been made more for financial and social reasons than for love as his letters indicate a stronger relationship with his Savannah female friend than with Mary. Throughout his life he preferred the company of females other than his wife. Robert apparently got the majority of his family satisfaction through his children for whom he showed a great deal of affection. Although he did not appear bitter

over the refusals of Mary to accompany him to many of his posts, Robert obviously was not happy over the many separations and what would have seemed his wife's preference of her mother and father over her husband. The Mexican war gave opportunity for Robert to demonstrate his bravery and resourcefulness although he did not directly command forces in battle. Both of his West Point experiences gave him much time to reflect on the ethics of military situations. However, Robert seemed reluctant to make important personal decisions and left much to the whims of his superiors. He did not espouse slavery and even spoke of it's evil but did little to change the system. Similarly, even though a well known and respected citizen of Virginia and strongly opposed to secession, Robert took no action at all to persuade the state to stay in the Union. He apparently felt that a military person had no role in politics. Up to this point religion had not yet become the central issue in his life as it would later. Robert's upbringing was mildly religious and he gradually became more concerned with spirituality as his life progressed.

#### The Issue of Loyalty

For each of the four officers, the operational definition of loyalty presented in chapter two is appropriate. The officers developed their concepts over the course of their entire lives and the idea was never concrete but rather somewhat situational. Recalling that the definition includes the four components of: 1. two entities or ideas with some sort of basis for trust, 2. multiple objects competing for trust, 3. a hierarchy of those relationships and, 4. a method of setting

up the hierarchy. Each component must be addressed as they applied to the subject officers.

### The Basis for Trust

The primary basis for trust among these men was their honor. Although the term has traditionally been ascribed more to those of aristocratic southern rather than common northern birth, Pemberton and (especially) Jackson appear to have been at least as conscience of the idea, if not more so, than Alexander and Lee. So "to be honorable" was something all four felt to be of primary importance. This honor was evident in many attributes, but nowhere as paramount as in the keeping of one's word. This was the absolute basis for the trust between the officers and any person or thing to which they felt loyalty. Whether in the form of a private deal, a marriage vow, or the oath of service to their country, these men felt that their word was their bond. They also expected those to whom they had pledged their loyalty to also be true to their word. Herein lies the first difficulty in the ethical outlook of these men. Apparently, if the other party did not adhere to their responsibilities then the matter became less than binding. Although each of these officers had *sworn* to defend the Constitution, it is significant that *none* of them left any evidence at having ethical difficulties on the basis of their oaths. Somehow the trust between county and officer had been violated, and, from the officer's point of view, violated by the country. It appears that part of this perception occurred through the political decisions of the non-slave holding states who were in the majority in both houses of Congress. By continual



pursuit of the removal of slavery as an institution, the slave holding states felt Congress to be committing acts contrary to the spirit of the Constitution concerning the right to private property. This must have had an effect on the four men as all of them were in some way economically involved with slavery. This was one instance where two objects of loyalty would be directly in opposition to each other.

### Multiple Loyalties

The four officers all had various loyalties but of different degrees and types. Although it may seem that the older officer would have a more complex system to deal with than the younger officer, in these four cases that does not appear to be so. Each officer is assumed to have had some sense of loyalty to the Constitution on the basis of their oaths of office.

John Pemberton had five identifiable loyalties competing for obedience. They were his career, his wife, his family and Pennsylvania, his duty as a U. S. officer, and his future in his adopted state of Virginia.

Edward Alexander had three evident loyalties in opposition. He had to decide between his future as a U. S. or Southern army officer, his obligation to Georgia, and his personal (perceived) bravery or cowardice.

Thomas Jackson alluded to three conflicting loyalties. He dealt with the county allegiances of western Virginia, his own pro-Union sentiments, and duty as a military officer.

Robert Lee also had three loyalties in direct opposition to each other. They were his future as a promised General of the Union, his obligation to his family and Virginia, and his pro-Union/anti-slavery beliefs.

### The Hierarchy of Loyalty

This is the key to understanding why these officers made their decisions to fight for the Confederacy. This assumes that they were honest about their thoughts in spoken and written word. Obviously if they were going to make a decision based on personal fear, gain, or other less than honorable motive they would probably not have told anyone about it.

John Pemberton went through a great deal of anguish as he made the decision because his loyalties were more or less equivalent. On the one hand he wanted to please Patti and live in Virginia. On the other hand he wanted to be a good officer and please his family and fellow Pennsylvanians. He must have felt that he was relieved of obligation to his oath through the act of resigning even though his brother reminded him that he would be considered a traitor.

Edward Alexander had very little discomfort over his decision to return to Georgia. His reply to Lt. MacPherson's plea was that his bravery was more important than personal gain. He reasoned that the southern army would need officers so he felt secure in his career as an army officer even with MacPherson's reasoning that the south could not win a war. Consideration for the feelings of his wife did not enter his thinking and so was not a competing loyalty. The excitement of the time

doubtless also added to the strength of the argument (although none was needed) for joining the Confederacy.

Of the four officers Thomas Jackson had the least personal difficulty with joining the Confederacy. Indeed, it appears that a decision was never actually made. He simply followed the orders of the school president when ordered to Richmond. The county where he was raised stayed in the Union, but Thomas never made the distinction that he had a choice in the matter. He was pro-Union but must have considered his own opinion to be of no consequence when called upon by his authority to act. This devotion to duty obviously applied even though he was not technically a military officer. Like Pemberton, he must have considered himself released from his oath to the Constitution when he resigned his active duty commission.

Robert Lee probably struggled more with his decision than any of the other three. This was not just due to the conflicting loyalties but also to Robert's aversion to making such decisions on his own. His letters show the vacillation between the opposing sides, especially the phrase wherein he states that he would sacrifice everything but honor for the preservation of the Union. He personally did nothing to preserve the Union. It seems that he may have used Providence as an excuse not to take personal action for which he could have been censured by his Virginia compatriots. In the same way he relied upon God to eventually solve the problem of slavery and therefore took no action against the institution he abhorred. So even though he professed a pro-Union/anti-slavery stance, his loyalty to such was not very pronounced. However, his entire life had been devoted to carrying out the legacy of

his ancestry and the heritage of Revolutionary War heroes of Virginia--- to include that of his father. Even the offer to be named the commanding general of an army could not overcome this creed. Robert obviously felt that a written resignation absolved him of the obligation of his oath as he told his brother he didn't want to resign under orders.

#### Why Pemberton, Alexander, Jackson, and Lee Joined the Confederacy

As previously mentioned, how a person sets up their own loyalty hierarchy will automatically determine the highest loyalty in any given situation. The simplest way of addressing this is finding what is most important in a person's life at any particular time. Once analyzed, the leading reason each of the four officers chose to join the Confederacy is easily determined.

##### John C. Pemberton

His main concern in life was Patti. Although his other loyalties were strong, his devotion to Patti ultimately caused him to join the Confederacy.

##### Edward P. Alexander

His priority was his southern concept of honor, specifically bravery. This bravery would be measured by his family and friends in Georgia. Therefore he had to follow Georgia into the Confederacy.

Thomas J. Jackson

He had to perform his duty regardless of circumstances. In this case that duty consisted of following orders, which he unhesitatingly did by taking his student/soldiers to Richmond and the Confederacy.

Robert E. Lee

He had to remain true to his heritage. Fighting against Virginia would be fighting against the traditions of over six generations of Lees and Carters. He had no choice but to follow Virginia into the Confederacy.

Did These Men Need More Professional Training or a Code?

It is highly improbable that anything the military could have done previous to the secession of the southern states would have made any difference. Each of these officers had gone through an institution known for it's high ethical and moral standards. In fact, these officers were probably more aware of their ethical responsibilities and obligations than most citizens of the nation. They all were raised in an environment based upon the precepts of Christianity and most probably felt they would eventually be judged by an authority higher than man. Each of them somehow divorced his actions from the obligation of an oath sworn before that same authority. It would be highly presumptuous to think that simple classes, written works, or even a moral or professional code would have made any difference in their ultimate choices.

## CHAPTER V

### CONCLUSION

Is there a problem with the lack of loyalty in the current United States Army Ethos? This is the original issue of this paper as stated in the first chapter. Throughout history the loyalty of soldiers has been an emotionally charged issue. This only makes sense since the use of force by nations can drastically alter the face of humanity and soldiers are the instrument of this power. From a purely academic and utilitarian point of view, a government would like to know that the military actually is an "instrument" to be wielded with impunity. However, the military is not a machine but a group of people bound together to accomplish certain tasks. Each of the members of this group has a personal "ethos" by which he or she makes decisions and generally conducts life. When the government attempts to employ the military in some manner which conflicts with these individual value systems, some type of problem will result. These problems could be as simple as a visit to the chaplain or as serious as treasonous rebellion. In order to provide confidence for the governing officials in the militaries they govern, some type of group value system can be defined. Military commanders may then use this system as a litmus test to judge the members of their particular organization and chastise or remove those who are not in compliance. By so doing, the government then may be

reasonably assured that they indeed have an "instrument" which can be applied to national situations as necessary.

This will work well as long as the government's own ethos is relatively in line with that of the governed populace. The problem arises when it is not. The Civil War was one example where the government no longer maintained the same ethos as a large segment of its own population. Since the military forces prior to the war were fairly representative of the population as a whole, many individual soldier's value systems also differed greatly from that of the government. The lack of the government to realistically address this difference resulted in the greatest loss of life in the nation's history.

The United States Army ethos is an attempt to define a value system which will inspire confidence on the part of the government and the people of the United States. This is good from the standpoint that the nation knows the values of its military forces. However, those values appear to be changing in ways that may not be readily apparent to outside viewers. Few Americans would argue with a military that requires integrity and selfless service on the part of its soldiers. The concept of duty, however, is something that many citizens may view differently than what is stated in the Army ethos. A citizen would likely think of duty in terms of doing something for the larger group which involves self-sacrifice on his or her part. This self-sacrifice is usually done so that some higher good may result for the group as a whole. In the current edition of FM 100-1 *The Army*, the authors emphasize this same spirit of doing what is good for the group. The problem is that the group spoken of is the Army. The implication is

that by doing that which benefits the Army, an individual will also be benefiting the nation. This is not necessarily the case. The key is in the missing fourth term--loyalty. Just as a government wants to know that its militaries will respond when called upon to perform some service, military superiors want to know that subordinates will obey their orders. This is often spoken of as being loyal to one's superiors. But there is a difference between obedience and loyalty. This is especially dangerous if a soldier confuses loyalty (obedience) to a superior with loyalty to the nation. This is situation which now exists with the Army ethos. Duty to the Army is paramount and the nation which it serves receives only lipservice..

But does this really matter? The research question asks, "Considering American historical tradition and experience, should loyalty be a part of the Army ethos?" Given the limited scope of the four Civil War generals, probably not. Even if a well defined ethos had been in existence at the time, it probably would have made very little difference. Why? Because the government (and the military which served it) could not compete with the higher loyalties of each officer's internal loyalty hierarchy. This is as it should be. If the nation expects men and women of principle to lead its armed forces, then it has the right to expect those principles to be founded upon service to the ideals of the nation and not an organizational ethos. An ethos is valuable as a basis for introspection and reflection, but, in the end, the personal values of individuals will always prevail.



## APPENDIX A

United States Military Academy  
West Point, N. Y. July 1<sup>st</sup> 1853

I E. P. Alexander of the State  
of Georgia aged Eighteen years Six months,  
having been selected for an appointment as Cadet in the  
Military Academy of the United States, do hereby engage,  
with the consent of my Father

in the event of my receiving such appointment, that  
I will serve in the Army of the United States for  
eight years unless sooner discharged by competent  
authority. And I E. P. Alexander

do solemnly swear that I will bear true faith and alle-  
giance to the United States of America, and that I will  
serve them honestly and faithfully against all their  
enemies or opposers whatsoever, and observe and obey  
the orders of the President of the United States, and  
the orders of the Officers appointed over me, according  
to the Rules and Articles of War. E. P. Alexander

Sworn and subscribed to, at West Point, New York  
this Twentieth day of February 1854

Before me

Moses Crosby

Special Justice Judge  
of Orange County

APPENDIX B

United States Military Academy.

West Point, N.Y. July 1, 1844

I, James J. Jackson, of the State of Virginia,  
aged thirteen years, five months, having been selected for an  
appointment as Cadet in the Military Academy of the United States,  
do hereby engage, with the consent of my Father, Guadalupe  
in the event of my receiving such appointment, that I will serve  
in the army of the United States, for eight years or less, as I shall

be charged by competent authority. And I, James J. Jackson,  
do solemnly swear, that I will bear true faith and allegiance to the  
United States of America, and that I will serve them honestly and  
faithfully against all their enemies or opposers whomsoever; and that  
I will observe and obey the orders of the President of the United States,  
and orders of the Officers appointed over me, according to the Rules

and Articles of War.

Sworn and subscribed to at West Point, N.Y.

this 20th day of February, 1844.

before James Jackson, Father.

Thos. J. Jackson

APPENDIX C



S. Robert E. Lee

appointed a Lieutenant Colonel of the Second Regt. of Cavalry in the Army of the United States, do solemnly swear, or affirm, that I will bear true allegiance to the United States of America, and that I will serve them loyally and faithfully against all their enemies or opposers whatsoever; and defend and obey the orders of the President of the United States, and the orders of the Officers appointed over me, according to the Rules and Articles for the government of the Armies of the United States.

R. E. Lee  
M. S. A.

Sworn to and subscribed before me,  
at West Point N. Y.  
this 15 day of March 1855.

Wm. H. Carpenter Justice of the Peace.

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